Actuate e.Reporting Suite 4

Using e.Reports

Release 4.1

Contains information proprietary to:

Actuate Corporation
701 Gateway Boulevard
South San Francisco, CA 94080
http://www.actuate.com

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Introduction

About Actuate e.Reporting Suite 4

e.Business customers use Actuate® e.Reporting Suite 4 to develop and deploy high resolution structured content to tens of thousands of users. Actuate takes web reporting to the next level by providing options for various needs as varied as seamless personalized web pages and traditional online and printed reports.

Customers building e.Business sites face challenges where Actuate e.Reporting Suite 4 offers the following solutions.

Challenge	**Actuate solution**
Developing custom content using HTML	DHTML provides a fast, no download option
Using plug-ins to view structured content	No need to distribute and install plug-ins for tens of thousands of users
Compromising information display due to lack of integrated tools	Provides template based design and display
Exploding use of web-based content delivery	Ability to support a million hits per day per CPU
Demand for personalized secure content	Page security for tens of thousands of users
Reuse of existing content	Open server provides access to content from other applications

Challenge	Actuate solution
Maintaining data integrity on hard copy	PDF provides high resolution printed copy
Portability of electronic data or content to other applications	XML output provides access to data across applications

Actuate tools and reports:

- Solve complex data access problems
- Solve formatting problems that go beyond the scope of other tools
- Scale to support thousands of users

The following summary describes the products in the Actuate e.Reporting Suite 4.

Product name	Use
Actuate Developer Workbench	An object-oriented application used by professional developers of structured content to design, build, and distribute report object designs and components throughout the enterprise. The Actuate Basic Language and Actuate Foundation Class Library support extensive customization capabilities.
Actuate e.Report Designer	An application that complements the Developer Workbench and is used by business users to design and distribute a variety of reports. These reports require no programming. This application supports both modification of complex reports and using sophisticated components from libraries.
Actuate End User Desktop	An application used by end users to request, generate, view, and print live report documents on networked client systems. The ReportQuery™ capabilities enable seamless transfer of data from an Actuate report to any productivity tool or analysis tool.
Actuate Viewer	Application for end users to find, view, and print report documents. The ReportQuery™ capabilities are also part of the Actuate Viewer.

Product name	Use
Actuate e.Reporting Server	A server application that generates Live Report Documents, manages them in the Report Encyclopedia®, and makes them available to users. This product includes with Actuate Administrator Desktop, an application for system and network administrators to manage and control one or more Actuate report servers. This product also includes Actuate ReportCast™ that transforms the Report Encyclopedia into a dynamic, secure web site. ReportCast provides the foundation for Channels and seamless integration with other web sites. This product includes Actuate Live Reports Extension (LRX) that works with both Microsoft Internet Explorer and Netscape Navigator to support report viewing and printing.
Actuate Advanced e.Reporting Server	An application that adds two capabilities to the basic e.Reporting Server, open server and page security. ■ Open server supports the use of third-party report generators with the Actuate e.Reporting Server. ■ Page security supports personalized viewing of parts of reports for different users

Product name	Use
Actuate Software Development Kit	Actuate ActiveX Controls embed Actuate reporting functionality into custom applications. Actuate Requester API accesses attributes and values of report parameters, changes the values of report parameters, controls how and when a report is generated, displays and prints reports, and configures report print setup. Access the Requester API using Actuate Basic, Visual Basic, C, or C++. Actuate search extension API supports developing search extensions to transfer data to any third-party productivity or analysis tool. Actuate report server API implements common Report Encyclopedia tasks, integrates report server features into existing corporate applications, automates routine or time-consuming tasks, and implements new feature groupings for custom business processes. Access the report server API using C++. Actuate Report Server Security Extension supports the use of third-party security tools. Actuate archive driver supports the use of third-party archiving software and hardware.

Actuate Viewer and Actuate Live Report Extension (LRX) are included with all products except Actuate Software Development Kit.

About *Using e.Reports*

Using e.Reports is included with these Actuate e.Reporting Suite products:

- Developer Workbench
- End User Desktop
- e.Report Designer
- e.Reporting Server
- Advanced e.Reporting Server

Using e.Reports describes the tasks you can perform with reports that have been designed, compiled, and generated:

- Viewing reports
- Searching for and exporting report data
- Working with reports on a server
- Running reports
- Printing reports

Except for running reports, these tasks are common to all Actuate products. You can run reports in all products except the Viewer, which you use only with report documents that are already generated.

Using e.Reports includes the following chapters:

- *Introduction*. This chapter provides an overview of this guide, the Actuate e.Reporting Suite, and the typographical conventions used.
- *Chapter 1. Using e.reports on the Web.* This chapter describes how to access Actuate reports over the Web using your web browser.
- *Chapter 2. Working with the desktop Navigator.* This chapter describes how to use the Actuate Navigator, and explains how to work with files and folders in the Report Encyclopedia.
- *Chapter 3. Viewing a report from the desktop*. This chapter discusses opening, viewing, and moving around in a report. It also describes how Actuate reports use links to other Windows applications.
- *Chapter 4. Running a report from the desktop.* This chapter discusses running report executables to generate new report documents. You learn how to work with report parameters and how to use standard and ad hoc parameters. You can generate new report documents with all Actuate client products except the Actuate Viewer.
- *Chapter 5. Searching for and exporting report data from the desktop.* This chapter describes how to search for specific data in a report and provides examples of how to use complex search criteria. It also describes how to export report data to other documents.
- *Chapter 6. Printing and distributing a report from the desktop.* This chapter discusses printing and distributing reports.
- *Glossary*. The glossary provides definitions of terms used in Actuate e.Reporting Suite 4.

Online documentation

The information in the printed manuals is also available as online books in Adobe Acrobat PDF format and in the online help system for the Actuate products. For products without a Windows interface such as the Actuate e.Reporting Server and the Actuate ReportCast, we provide HTML help files.

Using online manuals

The online manuals do not install automatically with the product. On the product CD, you find those files in the Manuals directory. Open the introductory PDF file to get an overview of the manuals. Copy this file and the files for each book you want to be able to use online to your local drive. The items in the table of contents and the page numbers in the index both contain links to the appropriate topics in the text. In the index, you access the link by positioning your cursor over the page number, not the topic.

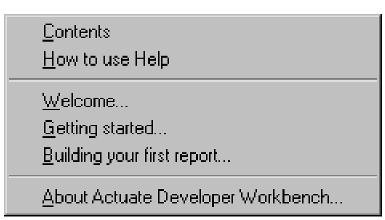
The HTML files install automatically with the product. These files can be viewed with standard browsers.

Online help

Actuate products provide both context-sensitive online help about the product and report-specific online help about the report you are viewing. The Actuate e.Reporting Suite makes it possible for developers to create customized report-specific online help. Report-specific online help is only available when you view a report using an Actuate desktop product, such as Actuate End User Desktop, Actuate Viewer, or one of the Actuate LRXs.

Using context-sensitive online help

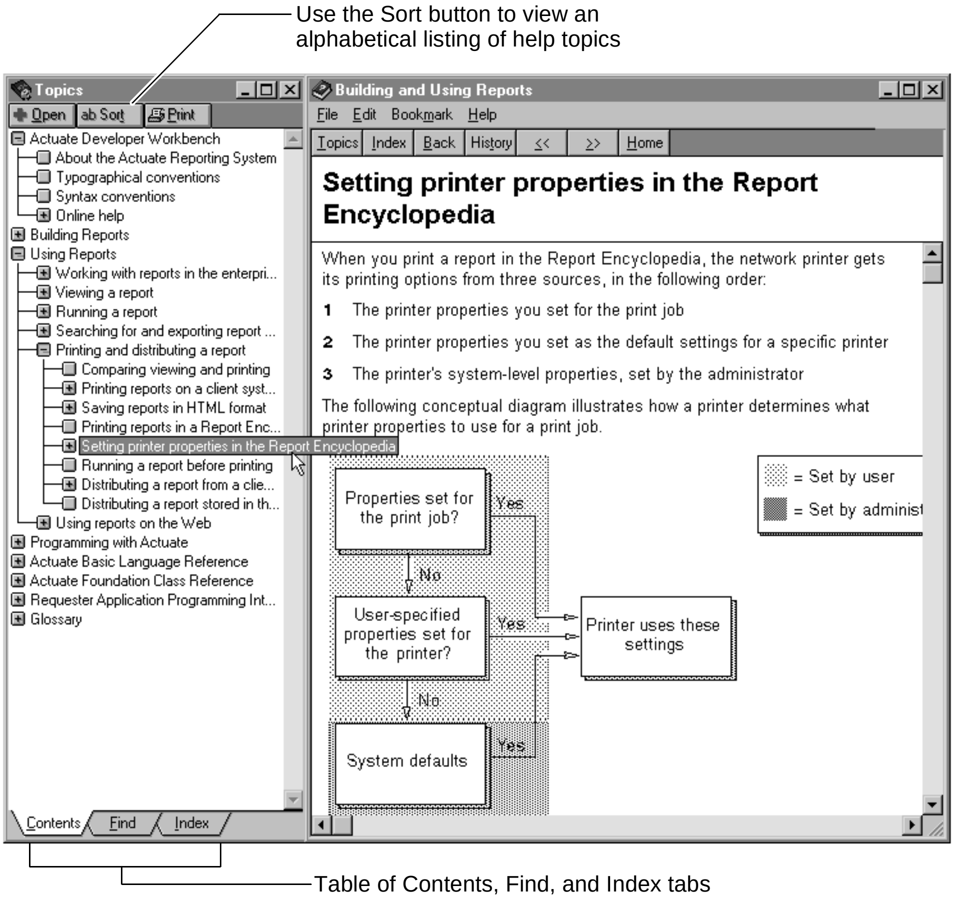
Sections from the printed manuals have been linked directly to the software interface to make relevant information available while you work. Dialog boxes that need additional explanation about how to use them have a help button. To access online help, use the Help menu in the menu bar.



An alternative method is to use the F1 key.

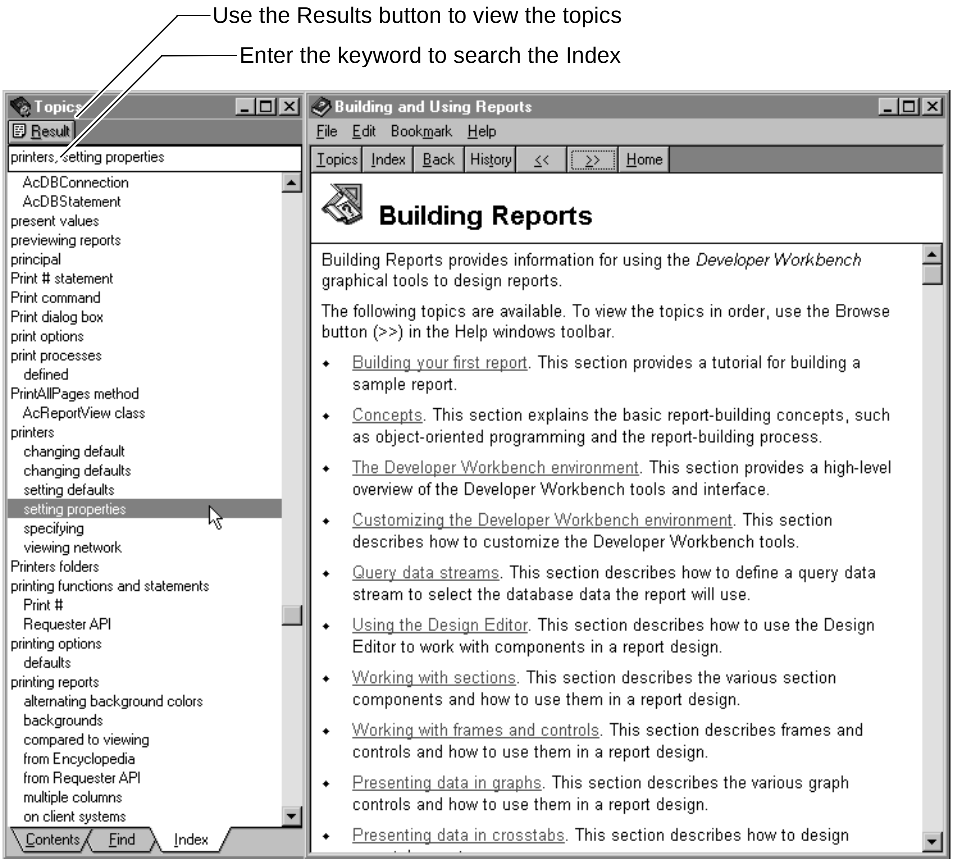
Using the Actuate online help system

Use two windows to access and view information in the e.Reporting Suite help system. The window on the right displays the contents of the online help topics. The window on the left displays the table of contents or the index of the online help system.

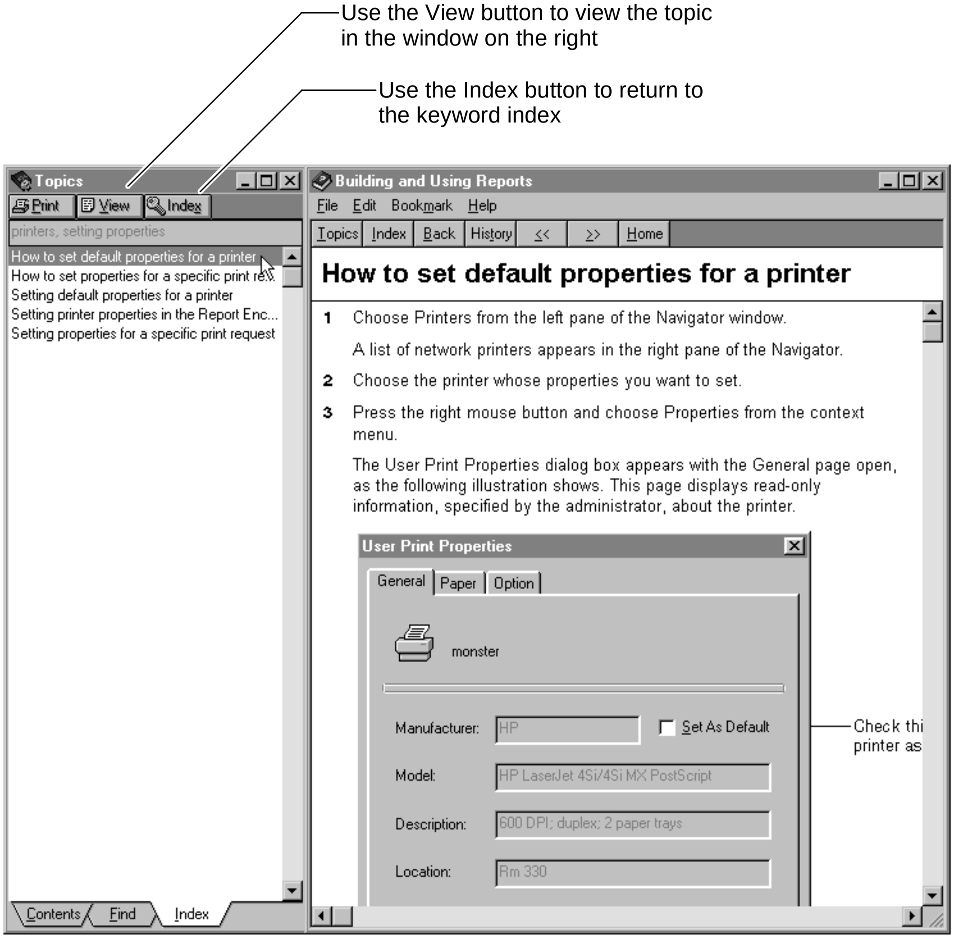


The tabs at the bottom of the left window access different views. Use these tabs to switch views among the Table of Contents, Find, and Index. The buttons at the top of the window change according to the tab you select at the bottom.

The following illustrations show an example of the Index and the result of an Index search.

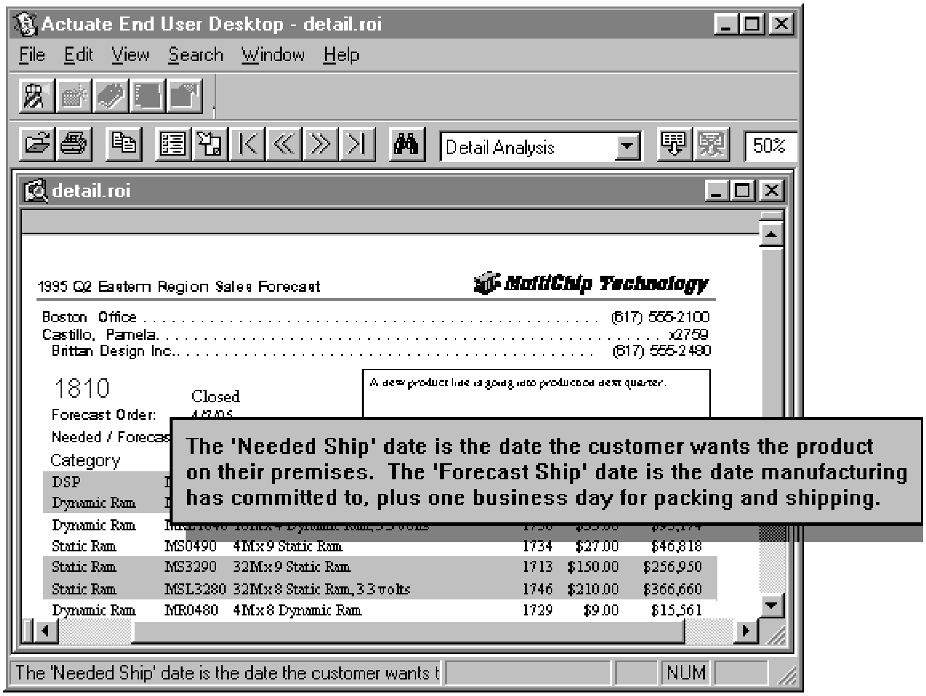


The following illustration shows the result of the search as it appears in the window on the left. To view the topic in the right window double-click the topic from the list. The topic displays in the window on the right.



Using report-specific online help

During the design phase, report developers have the option to include report-specific online help. For example, the report developer can add comments to give further detail about specific report objects or to explain how calculations were created.



For detailed information about report-specific online help see “Using online help in a sample report” in Chapter 3, “Viewing a report from the desktop.”

Typographical conventions

The following table describes the typographical conventions.

Item	Convention	Example
Code examples	Sans serif	Dim As String
File names	All uppercase letters	DETAIL.ROI
Key combination	A + sign between the keys means to press both keys at the same time	Ctrl+Shift
Menu items	Capitalized. No bold	File

Item	Convention	Example
Submenu items	Separated from main menu item with small arrow	File→New
User input or user response	Enclosed in quotation marks	“M*16*”

Syntax conventions

The following table describes the symbols used to present the syntax of Actuate Basic language elements.

<table>
<tr><th>Symbol</th><th>Description</th><th>Example</th></tr>
<tr><td>[]</td><td>Optional item</td><td>[Alias<alias name>]</td></tr>
<tr><td><></td><td>Argument you must supply</td><td><expression to format></td></tr>
<tr><td>{}</td><td>Groups two or more mutually exclusive options or arguments</td><td>{While | Until}</td></tr>
<tr><td>|</td><td>Separates mutually exclusive options or arguments in a group</td><td>Exit {Do | For | Function | Sub}</td></tr>
</table>

Chapter

1

Using e.reports on the Web

This chapter contains the following topics:

- About business reporting using Actuate
- Overview of the Actuate Web interface
- About the Report Encyclopedia
- Navigating the Report Encyclopedia on the Web
- Accessing and generating reports on the Web
- Using reports from a web browser
- About ReportCast channels
- Subscribing to channels
- Viewing channels and their contents
- About the LRX and web browsers
- What to do in the event of a system failure

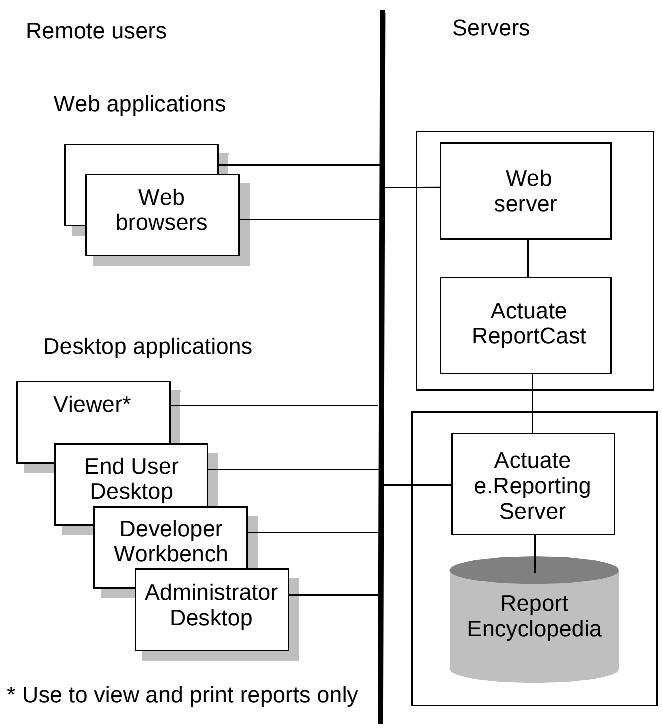
About business reporting using Actuate

In a diverse and global business environment, corporations need a way to design, publish, and distribute reports on a regular basis. The creation, storage, and viewing of report information is moving to distributed, networked environments such as the internet, intranets, and extranets.

Using Actuate e.reports provides an efficient, scalable, highly searchable, and easily updated alternative to static web pages or traditional, paper-based reporting.

You can store, view, print, and generate Actuate e.reports either remotely from a server or locally on your computer.

- To perform these tasks remotely using a server, your computer must be able to access a server running the Actuate e.Reporting Server. Using a web browser, access to the Report Encyclopedia is through a web server and Actuate ReportCast. Using an Actuate desktop application, access to the Report Encyclopedia does not require ReportCast.
- To perform these tasks locally, or on a stand-alone machine, you can use the Actuate Developer Workbench, e.Report Designer, End User Desktop, Administrator Desktop, or a web browser with the Actuate LRX installed.

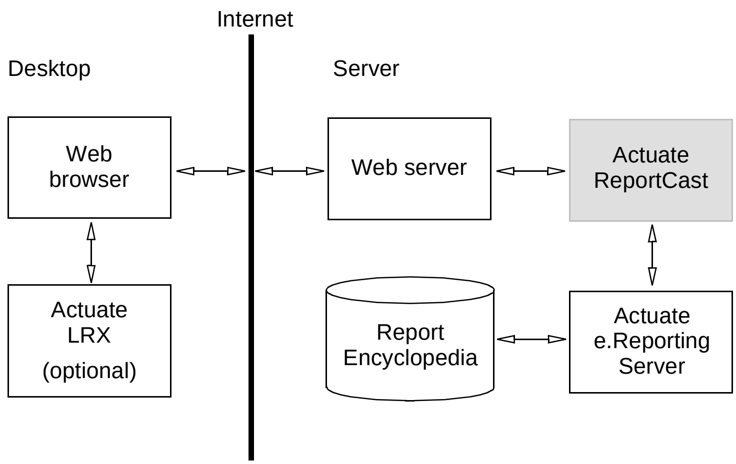


This chapter describes the use of a web browser that connects to the Report Encyclopedia through a web server using Actuate ReportCast.

For information about accessing the Report Encyclopedia using an Actuate application such as the Actuate End User Desktop, Administrator Desktop, or Viewer, see Chapter 2, "Working with the desktop Navigator." For information about using these products to view an Actuate report, see Chapter 3, "Viewing a report from the desktop."

Overview of the Actuate Web interface

Using Actuate ReportCast and a web server, you can access an Actuate Report Encyclopedia over the Web using a web browser. The following illustration shows where Actuate ReportCast fits into the Actuate Internet architecture.



Users can view reports in either DHTML format using a web browser that supports Javascript and Dynamic HTML (DHTML), or in the native .ROI format using the Actuate LRX (Live Report Extension). For more information, see "Report viewing modes," later in this chapter.

In addition to letting users navigate through an Encyclopedia and view reports, Actuate supports ReportCast channels. Channels use internet push technology to give users access to reports. Actuate supplies the following types of ReportCast channel web pages:

- **List of Channels.** A page that lists the channels to which the user is subscribed. This list is sorted alphabetically. (A web site designer can elect to put pages other than the list of channels on this list.)

- **Channel Contents Page.** A page that displays the contents of a channel. The contents are completed report requests. The completed requests are listed in descending chronological order.
- **Subscription Page.** A page that supports selection of lists of channels to which a user can subscribe. The user selects or deselects check boxes to subscribe to or unsubscribe from a channel.
- **Channel Administration Page.** A page that lets an administrator create, delete, and modify channels that appear in the user's channel Subscription Page.

As administrator, you can customize the look of the Report Encyclopedia pages by changing the ReportCast templates. For more information about customizing Report Encyclopedia web pages, see *Building an e.Reporting Web Site* distributed with Actuate ReportCast.

About the Report Encyclopedia

The Report Encyclopedia is a shared repository that contains all the items the e.Reporting Server manages. Users in an e.business or enterprise environment distribute and share report files by storing them in the Report Encyclopedia and displaying them on the Web.

Report Encyclopedia features

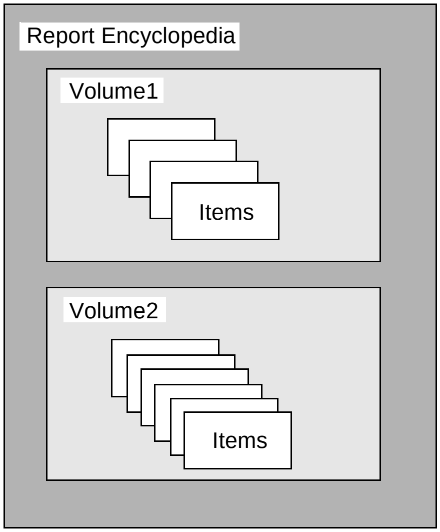
Key features the e.Reporting Server provides are the following.

Feature	Supports ...
Familiar file management system	Creating and working with hierarchical folders to organize report files.
Multilevel security	Limited report generation and viewing to authorized users. You can assign different privileges on a file or user basis. Secure read privilege on an Actuate report lets users read, but not download, the report.
Autoversioning	Grouping related report files to maintain different versions of reports that run on a regular schedule.
Flexible scheduling	Generating new reports at specified times. You can set a report to run once or on a regular basis. Supports automatic resubmission of failed requests.

Feature	Supports ...
Automatic notification and distribution	Placing completed reports in specified folders and sending notices to users.
Automatic archiving	Deleting and automatically archiving Report Encyclopedia files based on a date, the age of the file, or the number of versions of a file.
Access using web browsers	Viewing Report Encyclopedia contents over the World Wide Web. Viewing Actuate reports in DHTML format.
Report page security	Using report documents with security rules that determine which pages a user can view.
Open server report generation	Running or printing third-party report requests. From within the Report Encyclopedia, run or print a third-party report just like an Actuate report.
Report Server Security Extension (RSSE)	Supplying the ability to extend report page security.

Organization of a Report Encyclopedia

The Report Encyclopedia consists of volumes. A volume is a collection of Encyclopedia items managed by a report server. Administrators create volumes to group parts of a large Encyclopedia into convenient and manageable clusters. Within each volume are items such as folders, report files, and printers. The following illustration shows an example of the organization of a Report Encyclopedia.



Navigating the Report Encyclopedia on the Web

This chapter assumes that you are familiar with the Web and using web browsers. The illustrations in this chapter use the standard web pages provided by Actuate. Your report server administrator may customize the look of the web pages for your site, so your pages may appear differently from those in the illustrations.

Check with your Actuate report server administrator to find out if you can access reports on the Web.

To navigate through the Report Encyclopedia using your web browser, click hyperlinks contained on the Encyclopedia's web pages, or enter URLs in the Address or Location window of your web browser.

Navigating through the Report Encyclopedia with a web browser is similar to navigating through the Report Encyclopedia using an Actuate Navigator window. From the main Report Encyclopedia web page, click a folder's link. The folder contents page displays in the browser. You can continue clicking subfolder links to display their contents, click a report executable to generate a report, or click a report .ROI's, .ROV's, or .ROW's to view reports.

Accessing the Report Encyclopedia on the Web

To access your Report Encyclopedia, bring up your web browser and enter a URL that points to a web server. For example, to access reports using a web server called Caligari from a report server on a machine called Mustique, type:

http://caligari/acweb/mustique

Depending upon your setup, a login dialog box may appear. If it does, enter the user name and password you typically use to access your Report Encyclopedia.

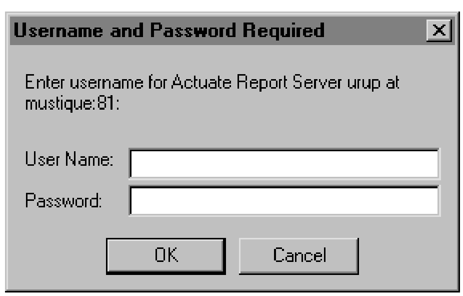
The following is the format of the URL to use a web server to connect to an Actuate Report Encyclopedia:

http://<web server>/acweb/<report server>

- <web server> is the name of the web server that is running the Web interface to the Report Encyclopedia. This name is unique to your company. You can get the name of the web server from your system administrator or webmaster.
- acweb is a keyword that indicates that you want to access the Report Encyclopedia
- <report server> is the name of the report server with the Encyclopedia you want to access. You can get the name of the report server from your system administrator or webmaster.

Logging on as a Report Encyclopedia user

When you first access the Report Encyclopedia using a web browser, the login dialog box appears. When you enter a valid user name and password, the initial report server view appears in your browser.



If your report server administrator has set up an anonymous user, you will not see a login dialog box. For more information about the Report Encyclopedia anonymous user, see “Logging on as the anonymous user” in the following section.

Logging on as the anonymous user

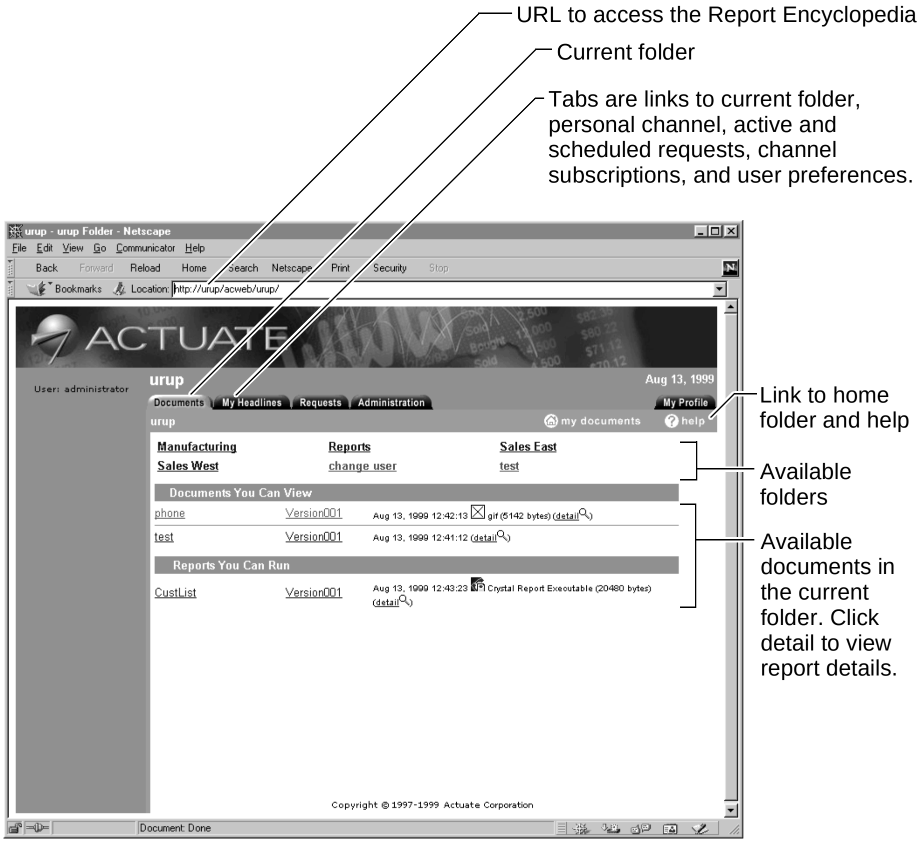
The anonymous user allows users to access a Report Encyclopedia without having to log on.

When the anonymous user attempts to view an object for which the user has only visible privilege, the login dialog appears. The user can then log on as another user with a privilege to view the object. The user must enter a valid user name and password to be able to view the selected object. The user is reconnected to the Report Encyclopedia with the new authentication information and privileges.

For more information about the visible privilege, see "About Report Encyclopedia folder and file privileges," later in this chapter.

About a Report Encyclopedia web page

When you log on to a Report Encyclopedia over the Web, the initial Report Encyclopedia page is similar to the following.



From this main page, you can:

- View the contents of the Report Encyclopedia
- Access your personal channel that contains your Completed reports folder
- Access the available Report Encyclopedia folders
- Get detailed information about folders

The left pane contains links to the Report Encyclopedia's system folders and the user's Personal folder:

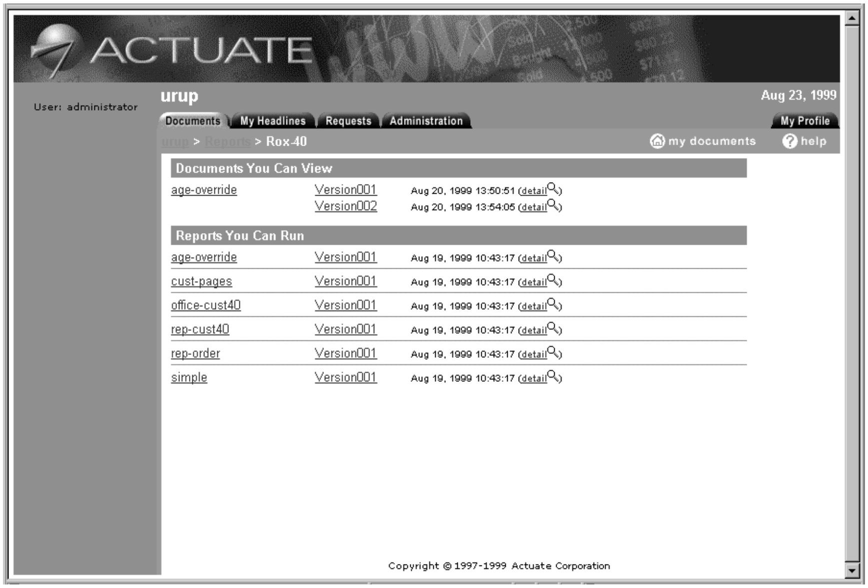
- The Report Encyclopedia administrator creates the Personal folder to hold the user's reports and other files.
- The home folder for the current Report Encyclopedia. In this case, the home folder is named mustique.
- The Active Requests and Scheduled Requests folders contain information about current and scheduled requests.

- The Channels folder provides access to completed requests in the Personal Channel, the channel subscription pages, and channel administration pages for Administrators.

The right pane lists the Report Encyclopedia objects available for viewing. Click the Detail link to access details such as the privileges needed to access them. Click a folder to view the folder's contents.

Accessing a folder's contents page

When you click a Report Encyclopedia folder's link to display its contents, you see a folder's contents page similar to the following.



The folder web page lists the folder's contents, including any subfolders, as well as links to your personal folder and to the Active and Scheduled requests web pages.

For information about the types of Actuate files, see "About Report Encyclopedia files" later in this chapter.

About Report Encyclopedia folders

As a user, the following are the types of folders you can access:

- Encyclopedia home folder that can be accessed by all users
- Item folders that contain report files and other item folders
- Printers folder that lists the network printers you can use
- Requests folder that contains information about report requests you submit

Item folders

There are two types of item folders you can access:

- Folders owned by other users for which you have been granted read privilege.
- Your personal folder, if the administrator created one. The purpose of the personal folder is to provide each user with a private location that other users cannot access. A user owns his or her personal folder and controls if and how other users can access its contents.

Requests folder

The Requests folder is a system folder that you access to find the status of report generation requests. The Requests folder contains three subfolders:

- The Scheduled folder shows requests you scheduled to run at a later date and time.
- The Active folder shows requests you scheduled that are currently in the process queue.
- The Personal channel folder shows requests that have been processed. These requests are requests you submitted, or requests for reports that other users have asked be sent to you.

About Report Encyclopedia files

As you browse the contents of folders in the Report Encyclopedia, you are likely to see a variety of file types, each with a specific function. Understanding the different types of files and their functions helps you better manage and use files in the Report Encyclopedia.

Report document (.ROI) files

Report documents are the finished reports you view and print. Use the Developer Workbench, End User Desktop, or Administrator Desktop to create report document files. Actuate reports can be viewed with a web browser either as DHTML or with the Actuate LRX (Live Report Extension) in the native .ROI format. Report documents can also be viewed in the desktop environment using Actuate desktop products.

HTML report document (.ROW) files

HTML report documents are created in the Report Encyclopedia when you run report executables that generate HTML reports. Use the Developer Workbench, End User Desktop, or Administrator Desktop to create HTML report files. An HTML report document is used only in the Report Encyclopedia. An HTML report document contains HTML files and other related files such as graphics files. When you view an HTML report document, the report server displays the HTML files and graphics in your web browser. You do not need the Actuate LRX to view an HTML report in your web browser.

Executable (.ROX) files

Executables are files you run to generate report documents with current data. Use the Developer Workbench or e.Report Designer to create report executables. For information about running report executables, see “Accessing and generating reports on the Web” later in this chapter.

Parameter value (.ROV) files

Parameter value files store parameter values specified for a specific report executable. Use the Requester in the Developer Workbench, End User Desktop, or Administrator Desktop to create parameter value files. The values in a parameter value file typically filter the data that appears in a report document. You run a parameter value file to generate a report with a specified set of criteria. For information about generating reports, see “Accessing and generating reports on the Web,” later in this chapter.

Search definition (.ROS) files

Save and use searches stored in search definition (.ROS) files on an Actuate report document. A search definition file contains search criteria, data to display, extract options, and report document structure information. For more information about search definition files, see “Using search definition files” in Chapter 5, “Searching for and exporting report data from the desktop.”

Design (.ROD) files

Design files contain components that specify the format and content of a finished report. Use the Developer Workbench to create report designs. Report developers can store design files in the Report Encyclopedia as backups or for sharing with other developers. You can open and edit a design file only on a desktop machine. You do not need access to design files to run, view, or print reports.

Basic Source (.BAS) files

Source files contain Actuate Basic code associated with a specific report design. Use the Developer Workbench to create source files. Report developers can store source files in the Report Encyclopedia as backups or for sharing with other developers. You can open and edit a source file only on the desktop environment. You do not need access to source files to run, view, or print reports.

Library (.ROL) files

Library files contain reusable report components. Use the Developer Workbench to create library files. Library files are typically included with different report design files. Report developers can store library files in the Report Encyclopedia as backups or for sharing with other developers. You can open and edit a library file on the desktop with the Actuate Developer Workbench. You do not need access to library files to run, view, or print reports.

Open server file types

Actuate e.Reporting Server defines a set of open server file types. Administrators can add additional open server file types. For more information about the Actuate open server, see “About Actuate open server reports” in Chapter 2, “Working with the desktop Navigator.”

- HTML files (.HTM and .HTML files)
- Crystal report files (Windows NT only):
  - RPX, defined as Crystal executable .RPT file
  - RPW, defined as Crystal web report .RPW file
  - RPT, defined as Crystal report .RPT file
- SQRIBE report files (Windows NT only):
  - SPF, defined as SQRIBE report .SPF file
  - SQR, defined as an uncompiled SQRIBE report .SQR file
  - SQT, defined as SQRIBE report .SQT file
- Text files (.TXT files)

About file versions

The Report Encyclopedia provides an autoversioning feature used to maintain different versions of a report. You can, for example, generate multiple reports from a report executable or parameter value file, and save each report as a different version. This capability is useful if you generate reports regularly and want to retain previous copies of the report. You set the versioning feature when you run a report executable. For information about running report executables, see “Accessing and generating reports on the Web,” later in this chapter.

About Report Encyclopedia folder and file privileges

Privileges indicate the operations users can perform on folders and files. For example, the read privilege for a file means users can view or print a file, but cannot change the file. Unless users have read or visible privilege on a folder or file, they do not see the folder or file in the Report Encyclopedia.

To add or delete files or folders, or change privileges on them, you must use the Actuate Navigator. For more information about accessing the Report Encyclopedia using the Actuate Navigator, see Chapter 2, “Working with the desktop Navigator.”

The following table lists the privileges for folders and files. Each row describes a single privilege and summarizes what that privilege means for different item types. Report Encyclopedia privileges are not additive. For example, if a user has write privilege on an item, that user does not automatically have read privilege on the item. The user must also have read privilege on the item or it is not visible.

The visible privilege lets you access as different users when you view the Report Encyclopedia from a web browser. For example, if you try to view a report document, or view its properties, and you only have the visible privilege for the document, the report server displays the Login dialog and lets you change your login to a user with different privileges.

Privilege	Item type	Meaning
Visible	Folders	Users can see a folder and its contents. Read or visible privilege is required for users to see a folder and its contents.
	All other types	Users can see the object and properties but they cannot view or print the object’s contents. If the object is a report, users cannot run a report. If a user is accessing the Report Encyclopedia with a web browser, any attempt at viewing contents brings up a web page.

Privilege	Item type	Meaning
Secure read	Report document	Users can create requests to print from the report server. Users that also have read or secure read privilege on the associated report executable can: ■ only view and print the report document in DHTML format from a web browser ■ generate XML or PDF output from a report Users cannot copy the object from the Report Encyclopedia. With the Advanced e.Reporting Server, Actuate page security is enabled. With the standard e.Reporting Server, Actuate page security is disabled and reports using page security are not readable.
	Report executable, report parameter values	Users that also have read or secure read privilege on the report document can: ■ only view the associated report document in DHTML format using a web browser ■ generate XML or PDF output from the report Users cannot copy the object from the Report Encyclopedia.
	All other types	Users cannot copy the object from the Report Encyclopedia. Users can examine the item's properties. If the item is a folder, users can see what it contains.

Privilege	Item type	Meaning
Read	Folder	Users can see a folder and its contents. Read or visible privilege is required for users to see a folder and its contents.
	Report document	Users can view and print the report document if they also have read or privilege on the associated report executable.
	Report parameter values	Users can schedule a request for the associated report executable if they also have read and execute privilege on the report executable. See execute privilege on report executables for requirements when running reports.
	Report executable	Users can run the report executable if they also have execute privilege. See execute privilege on report executables for requirements when running reports. If a user has only read privilege on a report executable, the user cannot see it.
	All other types	Users can examine the item's properties and view or print the item's contents.
Write	Folder	Users can create new items in the folder, copy or move items into it, or rename it. Users must also have read privilege on the folder or it is not visible. Users can move the folder to a different containing folder if they have read and write privileges on the destination folder. Users cannot rename or move folders from a web browser.
	All other types	Users can rename the item. Users must also have read privilege on the item or it is not visible. Users can move the item to a different folder if they have read and write privileges on the destination folder. Users cannot rename or move items from a web browser.

Privilege	Item type	Meaning
Delete	Folder	Users can delete the folder if they have write and delete privilege on all the items in the folder and the folder itself. Users must also have read or visible privilege on the folder or it is not visible. Users cannot delete folders from a web browser.
	All other types	Users can delete the item if they have write and delete privileges. Users must also have read or visible privilege on the item or it is not visible. Users cannot delete items from a web browser.
Execute	Report executable	Users can schedule a new request for the report executable. Users must also have read privilege on the report executable. In addition, users must have read and write privileges on: ■ the folder where the generated report document is stored ■ an existing report document if the report is versioned or replaced by the new report document
	Report document	Users can schedule a request for the associated report executable if they also have read and execute privilege on the report executable. See execute privilege for report executable for other requirements when running a report.
Grant	All types	Users can grant any privilege on the item, including the grant privilege, to other users and roles. Users must also have read or visible privilege on the item or it is not visible. Users cannot grant permissions from a web browser. Users with grant privilege on an object see all roles and users in the Privilege tab of the object's Properties dialog box.

There is a special role called All role that contains all the Report Encyclopedia users. For information about the All role, see "Using the All role," in the following section.

Using the All role

The All role is a system-created role that includes all the Report Encyclopedia users. The following describes the All role:

- Users can use the All role to give all Report Encyclopedia users privileges to objects. This includes new users added after the privilege is granted on the object.
- You cannot delete the All role.
- All users are members of the All role. You cannot remove a user from the All role.

Secure read privilege and the e.Reporting Server

Secure read on an .ROI for a user means that the user can only view or print the .ROI in DHTML format or generate XML or PDF output from the report using a web browser and Actuate ReportCast. The .ROI cannot be downloaded, bundled, or e-mailed or viewed in native format using the Actuate LRX or other Actuate applications such as the Viewer or End User Desktop. Viewing the report in the native format requires the downloading of the report to a cache on the user's machine.

Setting secure read privilege on a report executable .ROX means that the report executable can only be used when viewing or printing an .ROI as a DHTML report from a web browser. The .ROX cannot be downloaded by a desktop program or used in viewing reports using the Actuate LRX since the LRX downloads the .ROX when viewing an ROI. Users can create requests to print from the report server.

If a user has secure read privilege on a 3.x or earlier Actuate report document, the user cannot view the report. The user must have read privilege to view a 3.x or earlier report. The report can be viewed only with an Actuate desktop program such as the Actuate Viewer or LRX. The report cannot be read as a DHTML report.

If the Actuate report uses page security, setting a user's privilege to secure read on the report document enables the report's page security features. Page security is available only with the Advanced e.Reporting Server. For information about page security, see "About Actuate report page security," later in this chapter.

Setting secure read privilege on an object restricts users from copying the object from the report server. If a user has secure read privilege on an object in the Report Encyclopedia, the user cannot download that object from the Report Encyclopedia. Any of the user's applications that require a download to view the object cannot view it. For example, a user with secure read on HTML documents or text documents cannot view those documents using a web browser since a web browser downloads the files when viewing them.

About Actuate report page security

Actuate report page security is available with the Advanced e.Reporting Server. With report page security, Actuate report developers create a report document with security rules that determine which pages a user can view. Using the Actuate standard e.Reporting Server, the page security features of a report are disabled. With the standard e.Reporting Server, users are notified that the Advanced e.Reporting Server is required to read a report that uses page security.

Using report page security, the report developer creates a report that defines a list of users and roles associated with the report's groups and sections. In the report design, the list can be in the form of a static list or an expression that generates a list based on information in the report. This list is used to generate the Access Control List (ACL) for each report page. For information about creating reports using page security, see *Developing Advanced e.Reports* distributed with the Actuate Developer Workbench.

When the report is in the Report Encyclopedia and is viewed, the view process retrieves information about the user from the Report Encyclopedia. This information is then compared against the ACL for each page in the report to determine which pages the user can view.

Accessing and generating reports on the Web

You can get to reports on the Web by navigating through the Report Encyclopedia folders using links from Report Encyclopedia web pages. For more information about Report Encyclopedia web pages, see "About a Report Encyclopedia web page," earlier in this chapter.

You can also get to links to report documents in your personal channel web page or from other ReportCast channel pages. For more information about ReportCast channels, see "About ReportCast channels," later in this chapter.

Once you see the link to a report document on a web page, clicking the link displays the document.

You can generate reports on the Web by clicking report executable links in a Report Encyclopedia folder. For more information about generating reports on the Web, see "About report generation and the Web," later in this chapter.

The rules regarding report generation and viewing from a Report Encyclopedia apply. You still need the appropriate privileges to generate and view a report. And the users viewing the report via a channel also need the appropriate privileges. For information about privileges, see "About Report Encyclopedia folder and file privileges."

Users can schedule a report request within the range of January 1, 1980 and December 31, 2036, inclusive.

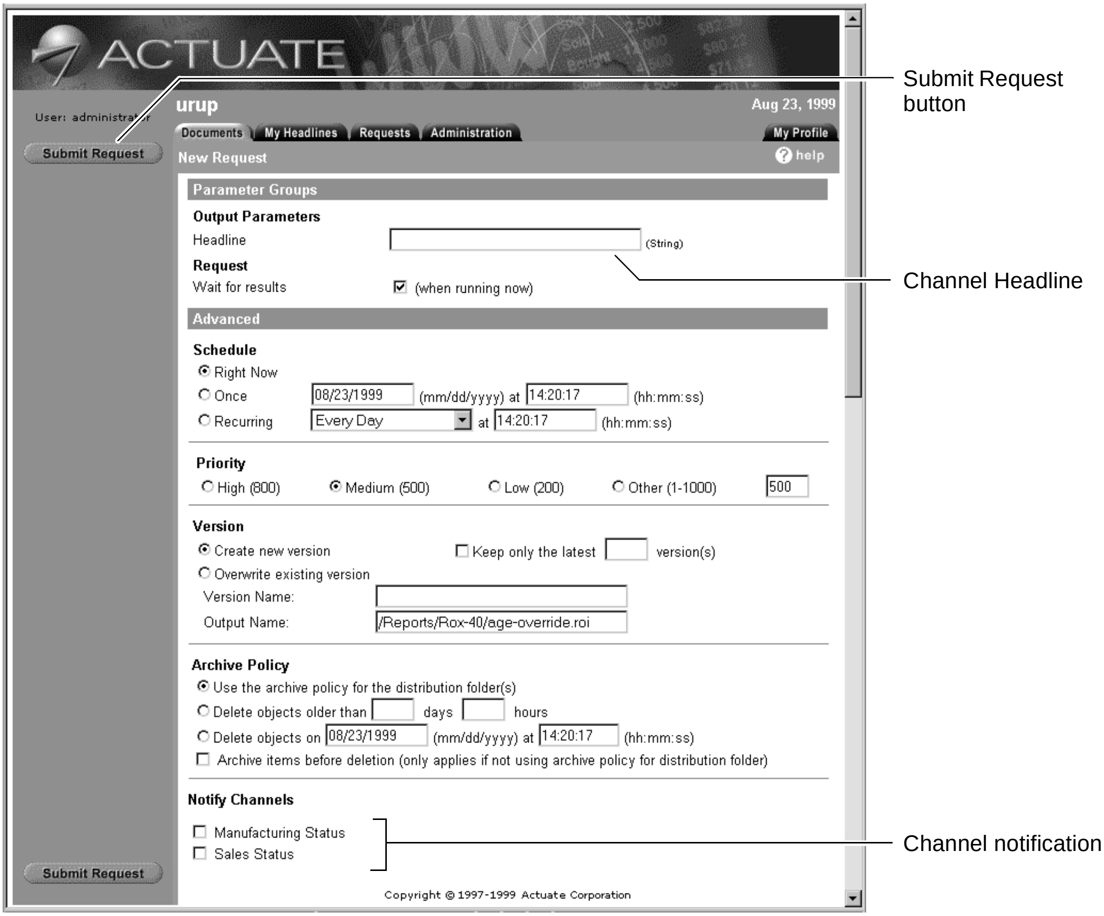
About report generation and the Web

When you generate a report from the report server, a notification message is displayed in one or more ReportCast channels. The notification appears in your personal channel and in the personal channels of users who are selected to be notified of a completed request. Users can view the report by selecting the notification item in the channel's page.

If you generate a report from a web browser, you can send a notification message to ReportCast channels to which you have access. A subscriber to the channel can view the report by selecting the item in the channel's page.

How to generate a report request from a web browser

1. From your web browser, log on to the Report Encyclopedia.
2. Go the folder containing the report executable (.ROX) or report parameter value file (.ROV).
3. Click the report executable to display the New Request page.
4. Enter the report request information. For reports displayed in channels, you can specify a headline. At the bottom of the web page, the available channels appear. Select the channels you want to notify when the report is completed. For each channel, you can exclude roles that have access to the report.



5 To submit the report request, choose Submit Request at the top or bottom of the page.

6 If you disable Wait for results and run the report immediately, a confirmation form displays in the browser similar to the following illustration. Click the Request Status button to check on your request's status. To cancel the request, click the Cancel Request button.

Using reports from a web browser

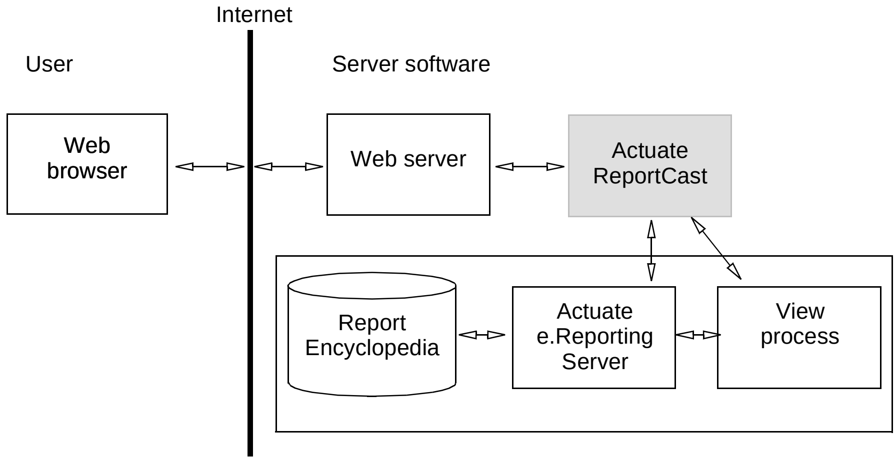
Actuate report documents can be viewed over the Web without the need to install any desktop software aside from a standard web browser that supports Javascript and Dynamic HTML (DHTML).

Actuate converts pages and other Actuate report document data to DHTML as needed. The report documents continue to be stored and managed in the Actuate Report Encyclopedia as report documents (.ROI). For viewing Actuate reports in DHTML format, there is no need to maintain separate HTML and .ROI report files. If the report is stored in an Advanced e.Reporting Server, Actuate reports using page security features can be viewed in DHTML format. For more information about page security, see "About Actuate report page security," earlier in this chapter.

Using the report server View process, when you view a page of a report document over the Web, the View process converts the page and other required report data to DHTML and delivers the page to the Actuate ReportCast. ReportCast and the web server deliver this page to you as a DHTML page. The View process can also convert Actuate report document data to XML for use with other web applications and PDF for printing.

When converting a report to XML, the View process converts the entire report, not just a single page. Depending on the memory available on your system, your browser can have problems opening or viewing large reports converted to XML.

The following illustration shows the interaction of the components when using the View process to view Actuate reports in DHTML format.



You can still view reports in the native .ROI format with the Actuate LRX for Netscape Navigator or Microsoft Internet Explorer and a web browser, or with the Actuate End User Desktop or Actuate Viewer applications.

Report viewing modes

You can specify the viewing mode for viewing Actuate reports over the Web. Specify either DHTML or LRX mode. The mode can be set for the Report Encyclopedia and for individual users. The user's preference overrides the Encyclopedia setting:

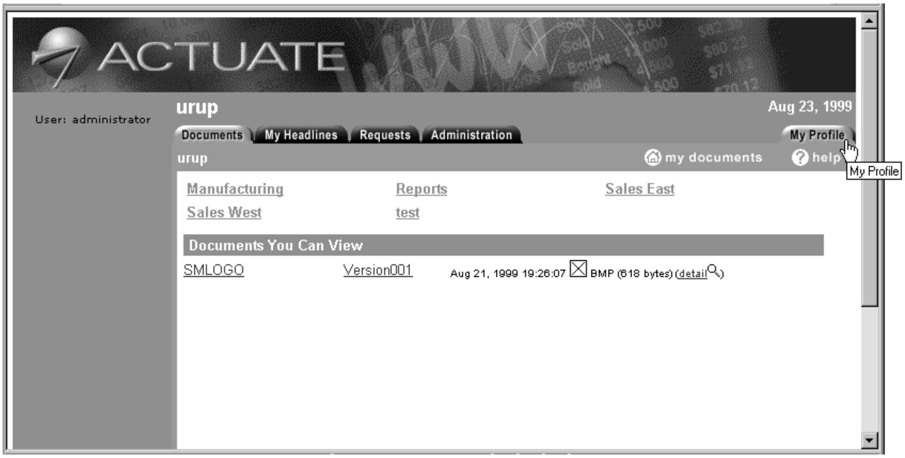
- DHTML—Actuate reports are converted to DHTML for viewing. Users need a Javascript and Dynamic HTML capable browser. The web browser must have the use of style sheets enabled.
- LRX—Actuate reports are viewed in the native format. Users must install the Actuate LRX with their web browser. For information about the LRX, see "About the LRX and web browsers."

When viewing a 3.x report from a web browser, your browser tries to use the LRX even if the viewing mode is DHTML.

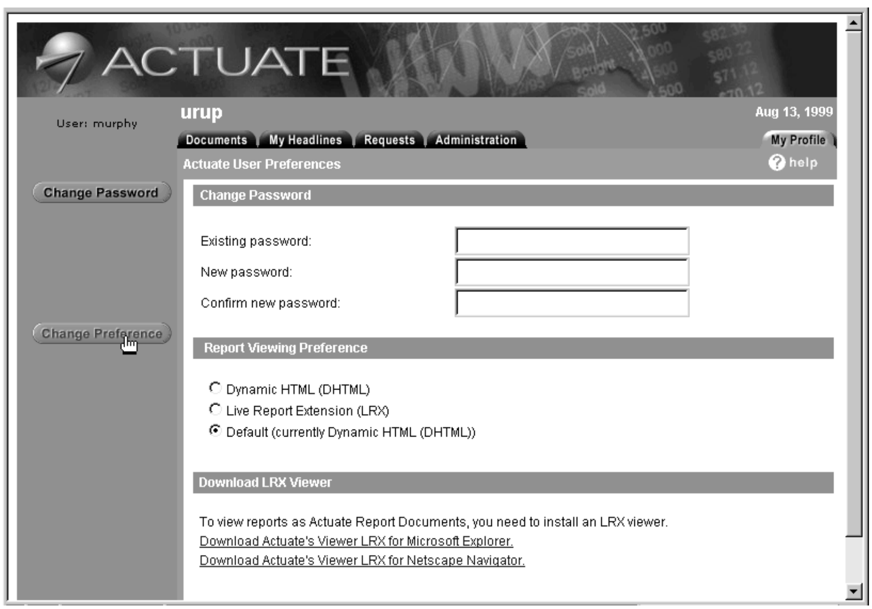
Setting a user's viewing mode

You can specify web viewing mode for Actuate reports for individual users. Select Default, DHTML, or LRX. The Default setting uses the Report Encyclopedia setting. If the setting differs between the user and the Encyclopedia, the user's viewing mode is used.

You can set the viewing options from a web browser. Log on to a Report Encyclopedia and choose the My Profile link.



The User Preferences page appears.



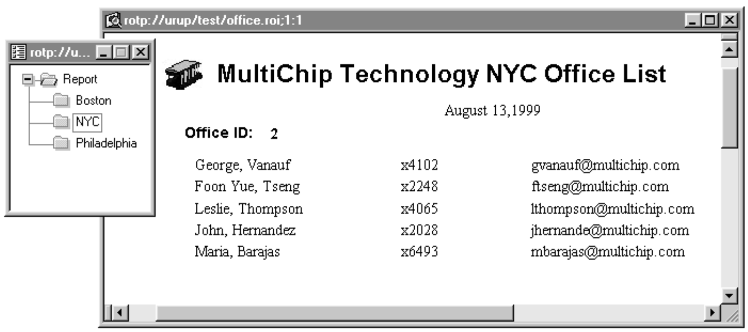
Select the viewing option or change your password. Choosing Change Preferences changes your Report Viewing settings in the Report Encyclopedia. Choosing Change Password changes your Report Encyclopedia password.

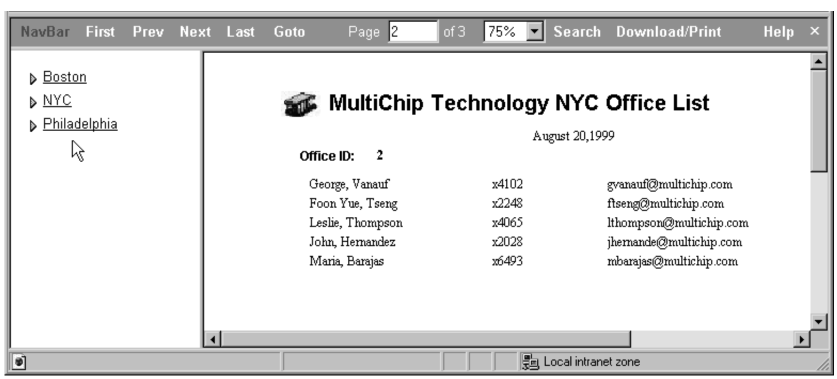
Viewing reports in DHTML

Using the Actuate view process, you can view Actuate reports in Dynamic HTML (DHTML) format. Using the view process, Actuate reports can use the page security built into the report. Actuate page security restricts access to sections of the report based on the security specified in the report and the user's login account.

Actuate reports in DHTML format are viewed in a web browser with formatting similar to a report viewed in an Actuate program such as the Actuate End User Desktop or the Actuate LRX.

The following illustrations show an Actuate report displayed in the End User Desktop and the same report displayed as DHTML in a web browser.





A report in DHTML format can appear different from the report displayed in an Actuate program application. This difference can be caused by the web browser's configuration, the machine's configuration, or the fonts on the machine. Contact your report server administrator if there are problems in this area.

If your cursor hovers over a control that has balloon help available, you see online help information provided by the developer.

When viewing a DHTML report, use the toolbar to navigate through the report, search the report, and save data from the report.

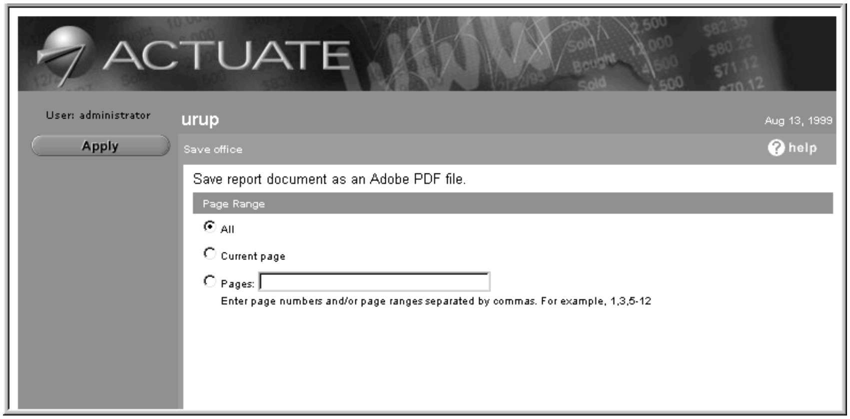
The controls perform the following functions:

- NavBar hides and shows the report's table of contents. Using the table of contents, you can go to a specific section of the report.
- Go to the next or previous page, or the first or last page.
- Enter a page number and press the Goto button to go directly to a page.
- Change the report page. Select a percentage size from the list. The setting remains until you change the percentage.
- Search for data in the report.
- Save all or part of the report as a PDF file.
- Help.
- The x button returns you to your previous page. This is similar to the browser's Back button.

Saving as PDF

Use saving as PDF to save all or part of your report in Adobe PDF format on your local machine. You can use this file with the Adobe Acrobat reader to view or print the report.

When saving as PDF, you see the following page. Select an option. For the Pages option, enter the pages to be saved. You can enter a series of pages separated by commas, for example 1,3,7, or a range of pages separated by a hyphen, for example, 5-10. Pages are generated in ascending order.



Depending on the memory available on your system, the Adobe Acrobat reader can have problems opening or viewing large PDF files. When saving a large number of pages to PDF, your web browser can display a time out message before saving is complete. You can save the pages using multiple save operations.

When viewing or printing the PDF file, it can appear different from the displayed report. Contact your report server administrator if you experience these problems.

When saving and viewing an Actuate report in PDF format, if a report uses a font other than Courier, Times Roman, or Helvetica, the font must be installed on the machine where the report executable ROX is generated and on the machine where the report is saved and viewed. If the font is not installed, Actuate substitutes Helvetica. Actuate does not substitute fonts if the font belongs to Courier, Times Roman, or Helvetica font families even if the font is not installed on the machine saving or viewing the report in PDF format.

If an Actuate report contains a font other than Courier, Time Roman, or Helvetica and the font is not installed on the machine where the report is viewed in PDF format, the Acrobat reader substitutes fonts.

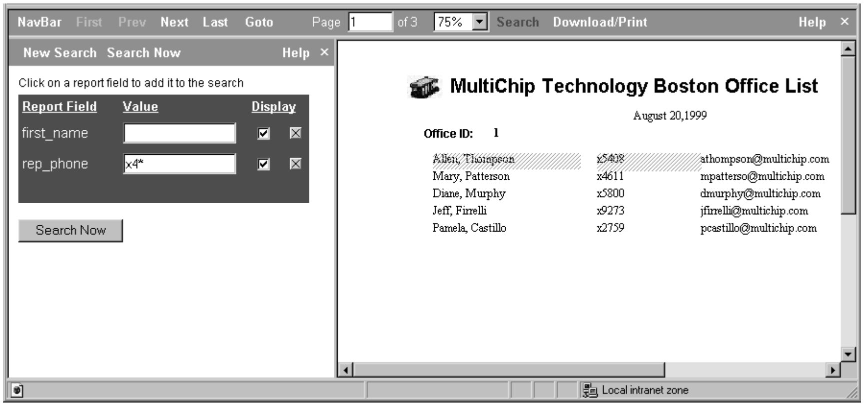
Using search with reports in DHTML

When you choose the Search button, the Report Query window appears. From the left pane, select a field in the report you want to search on. After the report page has finished loading in the left window, the word Searchable appears if you move your cursor over a searchable field. Before the report page has finished loading, links are active in the report window. When using the Netscape browser, the Report Query window cannot be used until the page has finished loading.

You can select multiple fields to search and enter the query for each field after the report page has finished downloading.

Use the same query syntax as for search using the Actuate desktop products such as the Actuate End User Desktop. For information about the Actuate query syntax, see “Using operators and wildcards in search expressions” in Chapter 5, “Searching for and exporting report data from the desktop.”

The illustration shows the Report Query window after choosing the employee name and phone extension.

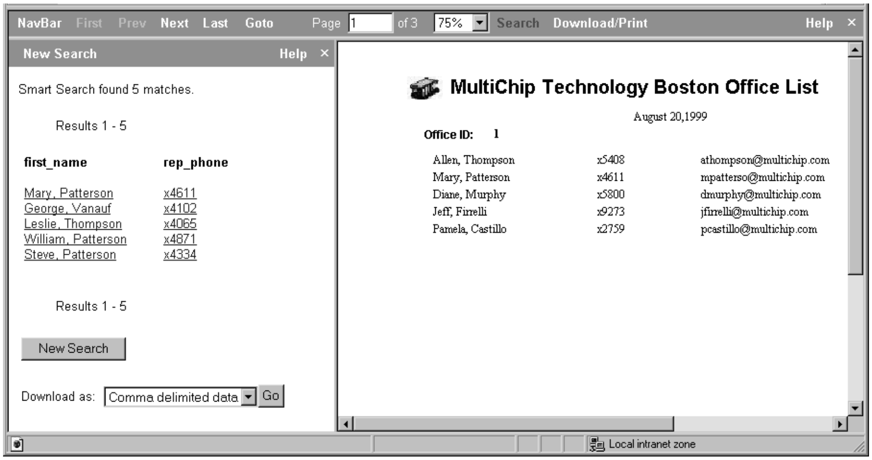


Choose the X button to remove the field from the search. Choose New Search to remove the search fields from the query window.

Choose the Display option to display the field in the results field. If the Display option is enabled, the data from the field is displayed in the Search Results page.

Choose Search Now to start the search.

The following illustration shows a completed search with five items found.

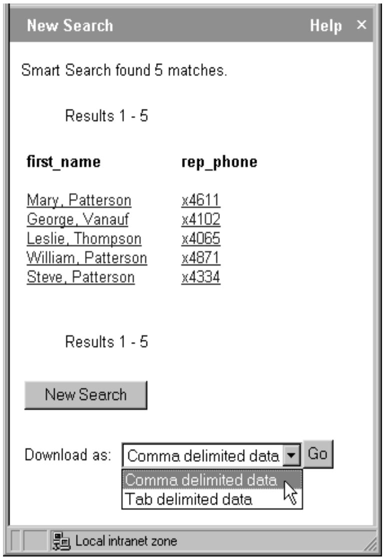


The items found are linked to the report page. When you select an item listed in the Report Query Results page, the report in the left window changes to the report page with the matching item.

Searching large reports can cause a timeout message to appear before the search finishes. Contact the report server administrator if this occurs.

Saving search results

Search results can be saved to a file as tab-delimited data or as comma-delimited data. Select the format and choose Go.



The browser prompts for information about how to handle the file. Select save file and specify a file name.

About ReportCast channels

Actuate ReportCast channels requires the Actuate Web Agent and a web server. ReportCast channels is a service which allows users to subscribe to particular web channels of interest, and view Actuate reports that are available on those channels. ReportCast channels use push technology (also called webcasting, push/distribution, and publish/subscribe) to send reports to particular web channels, where interested users can access and view them. When new reports become available, the appropriate channel receives a notification. From a Report Encyclopedia, subscribed users can check the channel's web page to get a list of available reports. When users click a report link, the report appears in the web browser window. The following are ReportCast channel features:

- Channels are supported only on the Web. They are administered only over the Web.
- Channels are secure. They use the same security scheme as Actuate Encyclopedia folders and items.
- Channels have unique names.
- Every user has a default personal channel. This channel is the user's report server Completed folder.
- Channels receive notifications when reports generated for the channel are complete.
- Reports in channels can display headlines that describe the reports. This headline appears when listing the contents of a channel.
- Channel items expire after a given time period and are automatically removed from the channel.

As a user, you can:

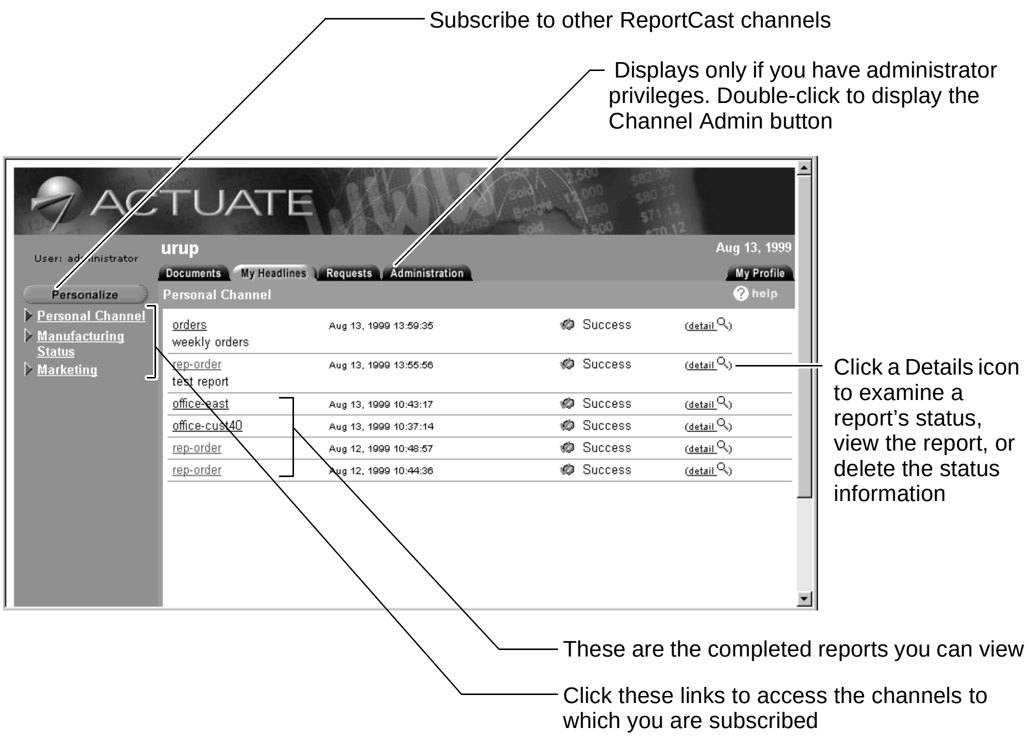
- Retrieve the list of available channels
- Subscribe to a channel
- Drop a channel subscription
- View the list of reports in a channel
- View the reports in a channel

As an administrator using a web browser, you can also:

- Create a channel
- Delete a channel
- Change a channel's properties
- Update a channel's contents

About your Personal Channel

From a web browser, the user's Completed request folder is the personal channel. After a successful report generation, the report notification appears in the user's personal channel. When you click the Channels link on the main Report Encyclopedia web page, a page such as the following displays in the browser.



From your Personal Channel, you can:

- Click the Subscribe button to subscribe to or unsubscribe from ReportCast channels.

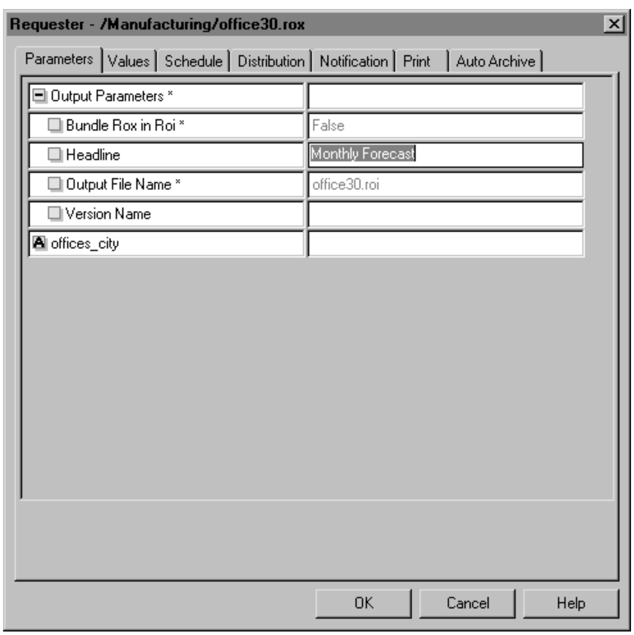
- Click the Channel Admin button to administer ReportCast channels. This option is available to administrators only.
- Click the channel icons to access particular channels to which you are subscribed.
- View completed reports.
- Click the Details icon to view a report's status, view the report, or delete status information for the report.

About ReportCast channel headlines

When you generate a report for a ReportCast channel, you can specify a headline that will be generated as part of the channel notification. The headline appears as the second line of a channel notification on a web page.

Users who generate a report from a web browser can enter a headline in the Requester web page. In the Requester dialog, the Headline parameter is one of the Output Parameters. In the New Request page, the Headline parameter appears as a field in the web page form. For information about creating report requests on the web, see "About report generation and the Web" earlier in this chapter.

Users who generate reports from an Actuate desktop product like the End User Desktop can enter a headline in the Requester dialog. The following illustration shows the Headline parameter in a Requester dialog.



Report developers can also access the headline parameter. By default, the report server copies the value of the headline parameter into the completed request headline. Developers can change the headline by changing the global variable that corresponds to the parameter. Changing the headline for a completed request does not change the original parameter. That is, if the report is run from an ROV file, then changing the headline for the completed request does not change the original parameter value in the ROV file.

Subscribing to channels

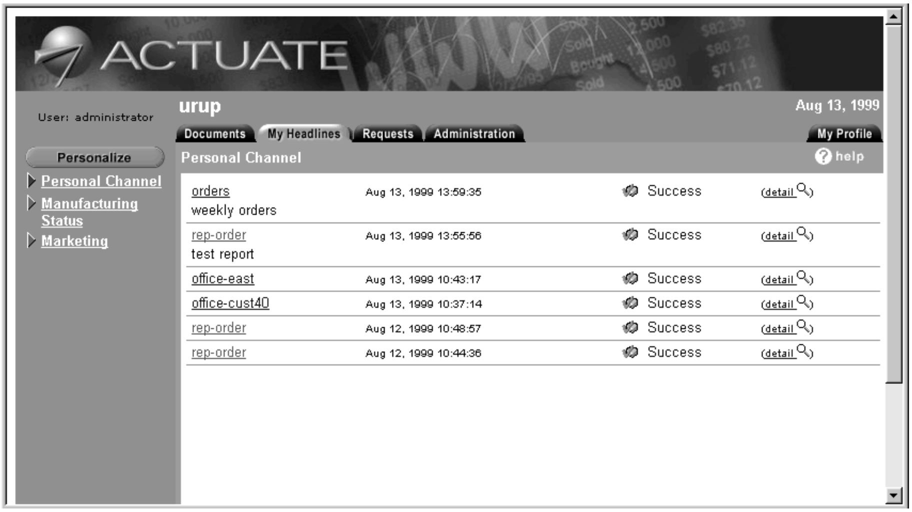
You can subscribe to channels and drop channel subscriptions using your web browser. After connecting to a report server, you can go to a page that lists all channels to which you have access. Each channel name appears next to a check box. The box will be checked if you are subscribed to the channel. You can change the check marks to subscribe to or unsubscribe from a channel.

Viewing channels and their contents

You can view a list of channels from your web browser. Actuate supplies a default web page that lists all the your subscribed channels. From this page, you can subscribe to channels and view the channel's contents. For more information about subscribing to channels, see "Subscribing to channels," earlier in this chapter.

As the Actuate default, when you view the contents of a channel, the contents appear as a list containing the report headline and optionally the report name, the creation date, and so on. Clicking the link for a channel item displays the report itself. The page that lists the channel contents can also list all the subscribed channels in the menu bar on the left.

The contents of a channel remain in the channel even after you have viewed them. The web browser uses a different color to display visited reports, so you can easily track which reports have been read.

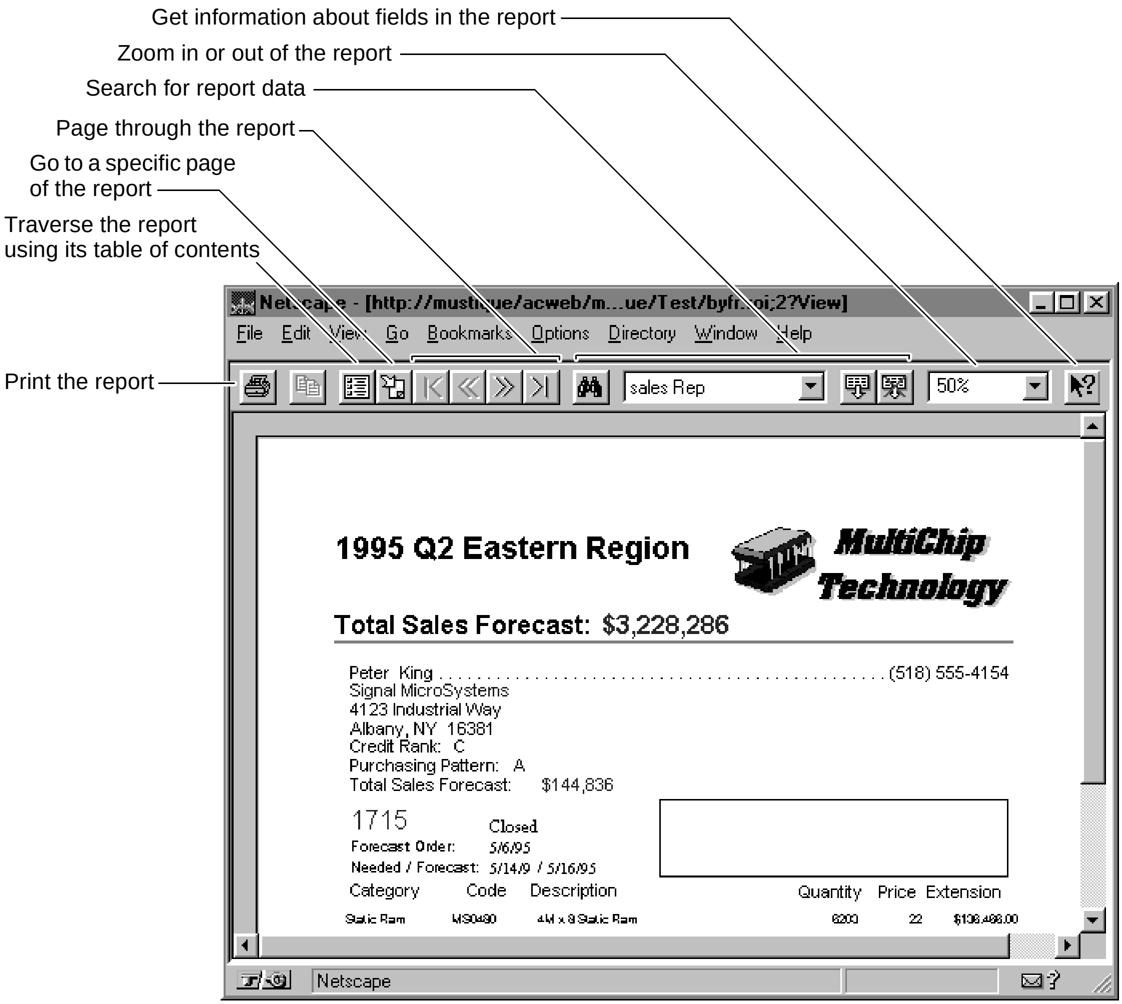


About the LRX and web browsers

If you install the Actuate LRX (Live Report Extension) with your web browser, you can view Actuate reports (ROI) from your browser. You can view reports that are stored on your local file system, or if your system is configured to do so, you can log on to an Actuate Report Encyclopedia using your web browser and view reports that are stored in the Encyclopedia.

From either your local file system or a Report Encyclopedia, you have the same report viewing, navigation, and searching capabilities that are available with the Actuate Viewer. For information about Actuate viewing and searching capabilities, see Chapter 3, "Viewing a report from the desktop," and Chapter 5, "Searching for and exporting report data from the desktop."

The following illustration shows a sample report when viewed from a web browser with the Actuate LRX installed.


Get information about fields in the report
Zoom in or out of the report
Search for report data
Page through the report
Go to a specific page of the report
Traverse the report using its table of contents
Print the report
Netscape - [http://mustique/acweb/m...ue/Test/byfr...oi;2?View]
File Edit View Go Bookmarks Options Directory Window Help
sales Rep
50%
1995 Q2 Eastern Region
MultiChip Technology
Total Sales Forecast: $3,228,286
Peter King . . . . . . (518) 555-4154
Signal MicroSystems
4123 Industrial Way
Albany, NY 16381
Credit Rank: C
Purchasing Pattern: A
Total Sales Forecast: $144,836
1715
Closed
Forecast Order: 5/6/95
Needed / Forecast: 5/14/9 / 5/16/95
Category Code Description Quantity Price Extension
Netscape

Using a web browser with the Actuate LRX installed to open and view a report stored locally is similar to opening a report with the Viewer. For more information see “Opening and viewing a report” in Chapter 3, “Viewing a report from the desktop.” To view a report that is stored in a Report Encyclopedia, see “Navigating the Report Encyclopedia on the Web.”

If you are viewing an Actuate report stored locally, not from the Report Encyclopedia, you might need some additional files. If the report is not a bundled report, you need the report executable, .ROX file. Depending on the LRX version and the report version, you might need an Actuate library. Actuate libraries have the name AFCxxxx.ROX where xxxx is a number. The AFC libraries are placed in the AFC directory of the LRX installation. For the default installation, the AFC directory is C:\LXR\AFC. See your report server administrator or the sender of the report if you need additional files.

What to do in the event of a system failure

If the Report Encyclopedia becomes unavailable—because of a machine or network connection failure—the information in the Report Encyclopedia is automatically restored to its last consistent state when the report server is restarted. Operations in progress at the time of the crash are backed out of the Report Encyclopedia.

For example, if you were in the process of copying a file to the Report Encyclopedia, that file might not have been copied. Or, if you had just submitted a request to run a report, that request might not exist in the Scheduled folder. When the Report Encyclopedia is available again, you should check the items you were working on prior to the crash to see if you need to perform a task again.

If reports were being generated when the report server failed, the report server restarts the generation process automatically. You do not need to take any crash recovery steps.

If you encounter any other problems after taking the crash recovery steps, contact the report server administrator.

Chapter

2

Working with the desktop Navigator

This chapter contains the following topics:

- Connecting to the Report Encyclopedia
- Using the Navigator with the Report Encyclopedia
- Using Report Encyclopedia folders
- Using Report Encyclopedia files
- Report Encyclopedia viewing modes
- Viewing Report Encyclopedia request retry settings
- Using Report Encyclopedia auto-archive

If you work on a stand-alone computer or do not have access to Actuate e.Reporting Server, you can skip this chapter.

Connecting to the Report Encyclopedia

To connect to and explore a Report Encyclopedia, use either the Navigator or a web browser. For information about connecting to the Report Encyclopedia using a web browser, see Chapter 1, “Using e.reports on the Web.” To use the Actuate Navigator, you start an Actuate application such as the Actuate Viewer or End User Desktop and start the Navigator.

Using the Actuate Navigator, you can view the contents of a Report Encyclopedia and navigate through the Report Encyclopedia and view reports. You can also add or delete files or folders or change privileges on them. For information about manipulating files and folders, see “Using Report Encyclopedia folders” and “Using Report Encyclopedia files,” later in this chapter.

Using the Navigator, you connect to a Report Encyclopedia by specifying the volume (machine name) whose items you want to access. You have access to a volume if the following two requirements are met:

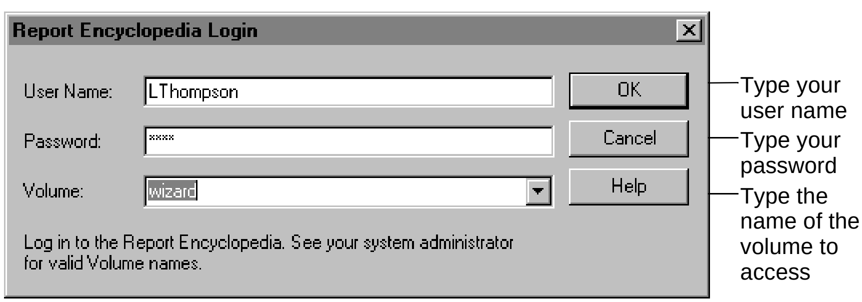
1. Your machine is connected to a server running Actuate e.Reporting Server.
2. You have an assigned user name and password for the volume. The user name and password are set up by the report server administrator.

The Navigator can log on to only one volume at a time. You can open multiple Navigator windows to log on to different Report Encyclopedias.

How to connect to a Report Encyclopedia

1. From an Actuate application such as the Actuate Viewer or End User Desktop, choose the Navigator toolbar button.

   The Report Encyclopedia Login dialog box appears.



2. Type your user name as assigned by your system administrator.
3. Type your password as assigned by your system administrator.

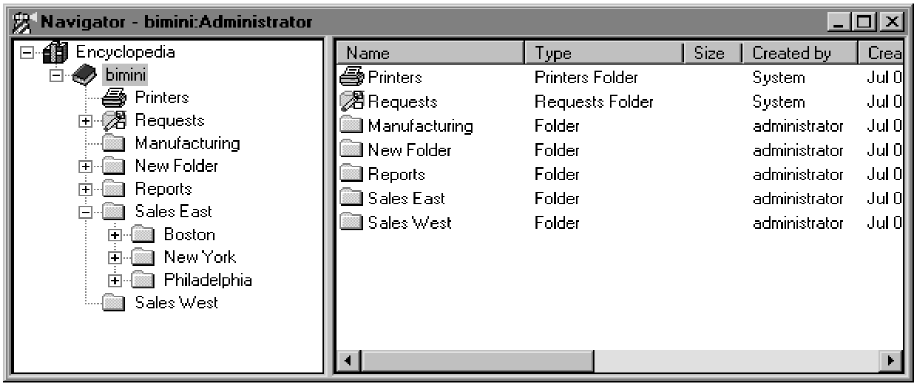
4 Type the name of the volume of the Report Encyclopedia in which you wish to access reports. The volume name is the name of the computer running the report server. You can also identify the Report Encyclopedia in the following ways:

- Choose its name from the list of recently accessed Encyclopedias.
- Type the Report Encyclopedia IP address.

For a list of volume names, contact your report server administrator.

5 Choose OK.

The Navigator window appears, displaying the contents of the volume you selected, as shown in the following example illustration.



Solving log on problems

If you get the message Log in Failed when connecting to the Report Encyclopedia, contact your system administrator to verify the following information:

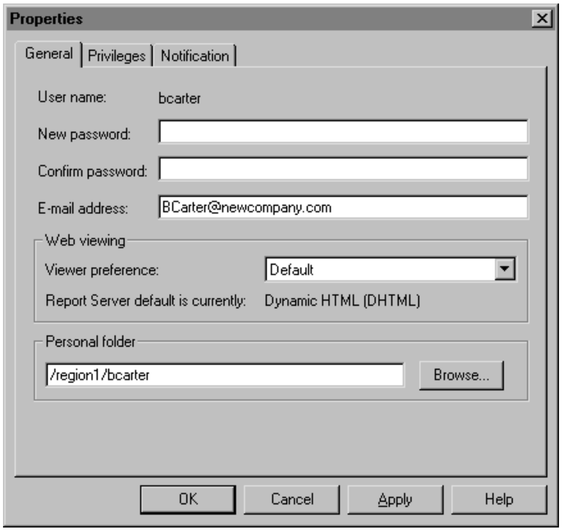
1 Confirm that you are using the correct user name, password, and volume information. If you are, go to step 2.

2 Check that the report server and the server on which it is installed are running. If both are running, go to step 3.

3 Check that your computer has network access to the server.

Changing user properties

After logging in, a user can view and change user properties. Choose User options from the Edit menu to display the user Properties dialog box.



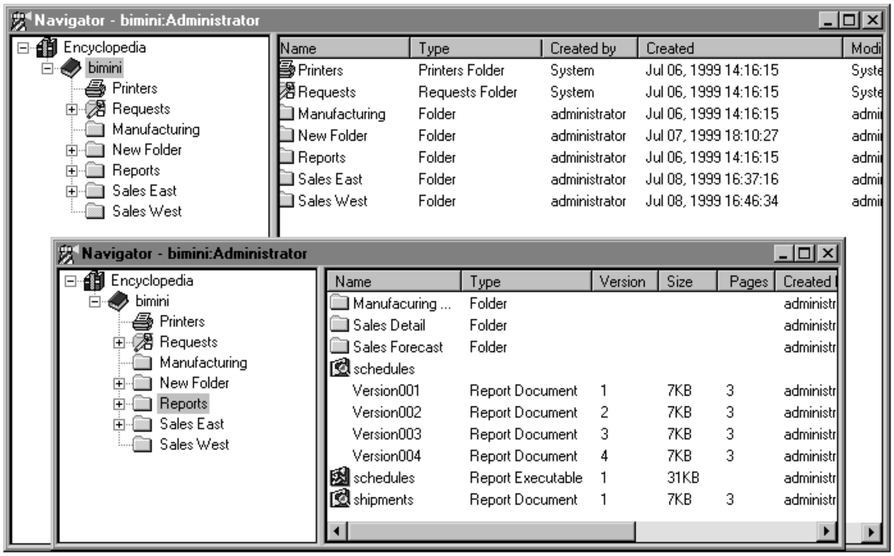
A user can change the following settings in the General, Privileges, and Notification pages of the user's Properties dialog box:

- In the General page, users can change their login password, report viewing preference, and personal folder:
  - Default viewing preference—For more information about Actuate report viewing modes, see "Report viewing modes" in Chapter 1, "Using e.reports on the Web."
  - Personal folder—If specified, the user controls other user's access to the personal folder's contents. It is also the default location for reports generated by the user.
- In the Privileges page, users can change their privilege template. The template specifies the privileges that other users have on items the user creates.
- In the Notification page, users can specify how they are notified when they are informed that a report request is completed in the Report Encyclopedia Completed notice folder, or using e-mail:
  - Selecting Completed folder notice sends completed report notices to the Report Encyclopedia Completed folder. The user can select the notifications for successful or failed report requests and can specify when to delete completed notices.
  - Selecting e-mail notice sends e-mail to the user's e-mail address. If the user selects Attach result and has read privilege on the report, the report server attaches the report to the e-mail notification. If the user does not have read privilege, the location of the report is included in the e-mail notice.

Using multiple Navigator windows

You can log on to multiple volumes by opening multiple Navigator windows. Another useful strategy is to open multiple Navigator windows to have multiple views of the same volume.

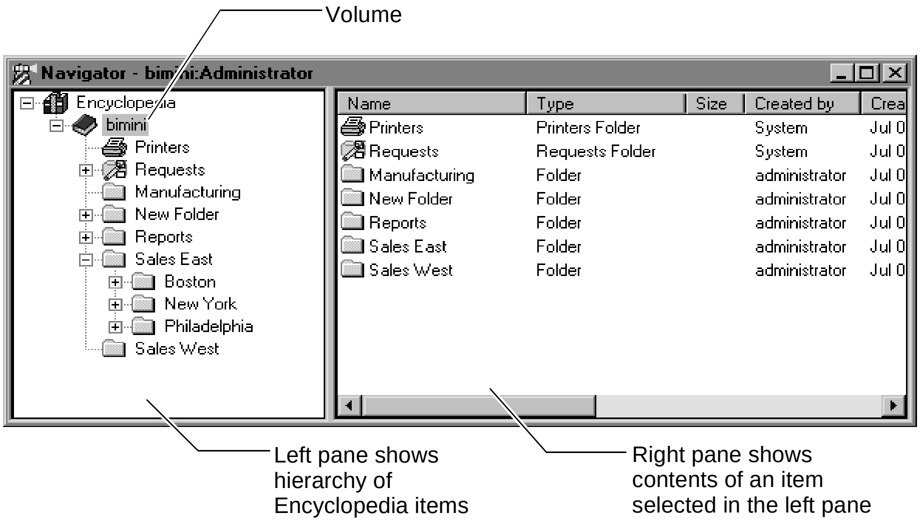
The following illustration shows items for two different users on the same volume.



Understanding the Navigator window

You use the Navigator to access and work with items in the Report Encyclopedia. If you are a Windows 95 user, you will find that the Navigator features and interface resemble that of the Windows Explorer.

Like the Explorer window, the Navigator window is divided into two panes. The left pane displays the hierarchy of items in a volume in the Report Encyclopedia. The right pane displays the contents of an item selected in the left pane. You can change the size of either pane by moving the splitter bar that divides the window.



Using the Navigator with the Report Encyclopedia

After you have connected to the Report Encyclopedia using the Actuate Navigator, you can view and search for items in the Report Encyclopedia. If you have the appropriate privileges, you can also perform other operations such as:

- Create report requests to generate or print a report
- Add, delete, or move folders and other Report Encyclopedia items
- Change privileges for users and roles on folders and other Report Encyclopedia items
- Specify auto-archive rules

Viewing items in the Report Encyclopedia

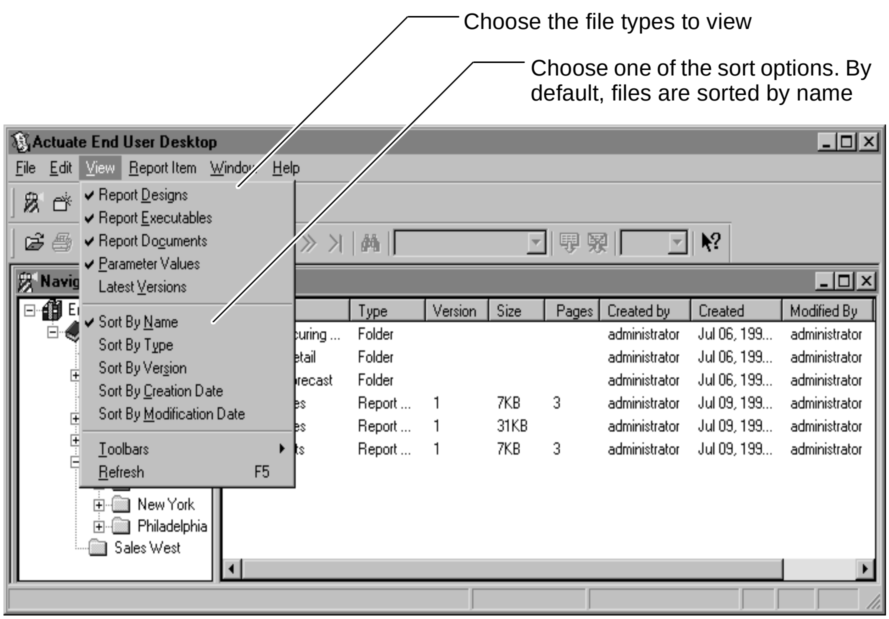
When you first start the Navigator, the window displays the top-level folders in the Report Encyclopedia volume. To expand and collapse the levels, click the plus (+) and minus (-) signs.

How to view the hierarchy of items in the Report Encyclopedia

1. Click an item on the left side of the window to display its contents on the right.
2. Click the plus (+) sign to display more levels.

Changing the appearance and order of items in a folder

By default, all contents of a selected folder appear in the right pane of the Navigator window and are arranged in alphabetical order. You can, however, choose the file types and sort the items in a number of ways. The following illustration shows all files sorted by name.



How to change the appearance and order of items in a folder

1. Choose the View menu.
2. Choose the types of files you want to view.
3. Choose one of the sort options.

Searching for items in the Report Encyclopedia

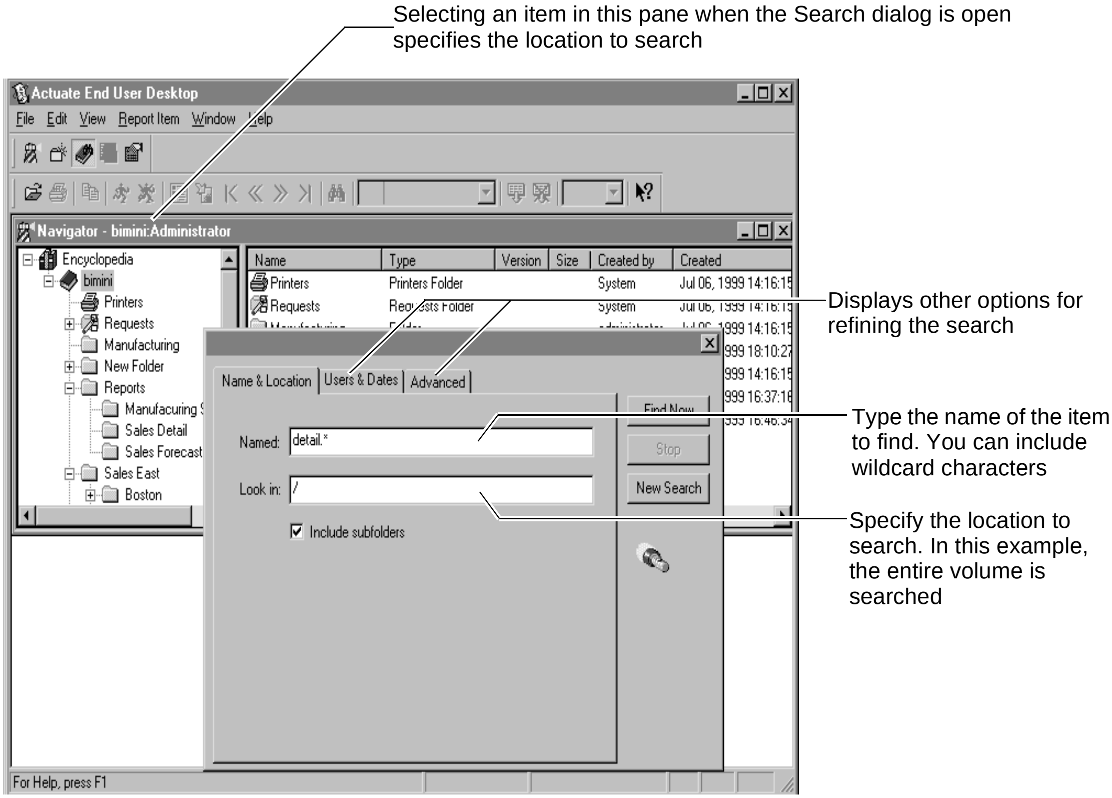
You can search for Report Encyclopedia folders or files using any combination of the following criteria:

- File or folder name, including wildcard characters
- Location, including or excluding subfolders
- Creator of the file or folder
- Date of creation
- Users who modified the file or folder
- Date of modification
- Item type, for example, folder or any report file type
- File version
- Content of comments
- File or folder size

How to find a file or folder in the Report Encyclopedia

1 Choose the Search Encyclopedia toolbar button.

The Search dialog box appears.



2 In the Named box, type all or part of the folder or file's name.

You can use any of the standard wildcard characters. If you do not know the name of a file or want to refine the search, choose the Users & Dates or Advanced tabs.

3 In the Look in box, type the location or select an item in the Navigator Window where Actuate should begin its search.

To search the entire Report Encyclopedia, type / (forward slash) or select the Encyclopedia or volume icon in the left pane of the Navigator window.

4 Choose Find Now to start the search.

Actuate displays the results in the bottom section of the Search dialog box. From the results section, you can view report documents and use the file's context menu to perform other operations.

Getting information about Report Encyclopedia items

The Report Encyclopedia maintains a lot of useful information about each item it contains. For example, for any given file, you can check its version name, its owner, the files it depends on, users with privileges to the file, and so on. Using this information, you can better manage your personal folder and analyze information in other folders.

Information about an item is displayed two ways, an abbreviated version appears in the right pane of the Navigator for any item selected in the left pane, or you can use the context menu to bring up the Properties dialog box.

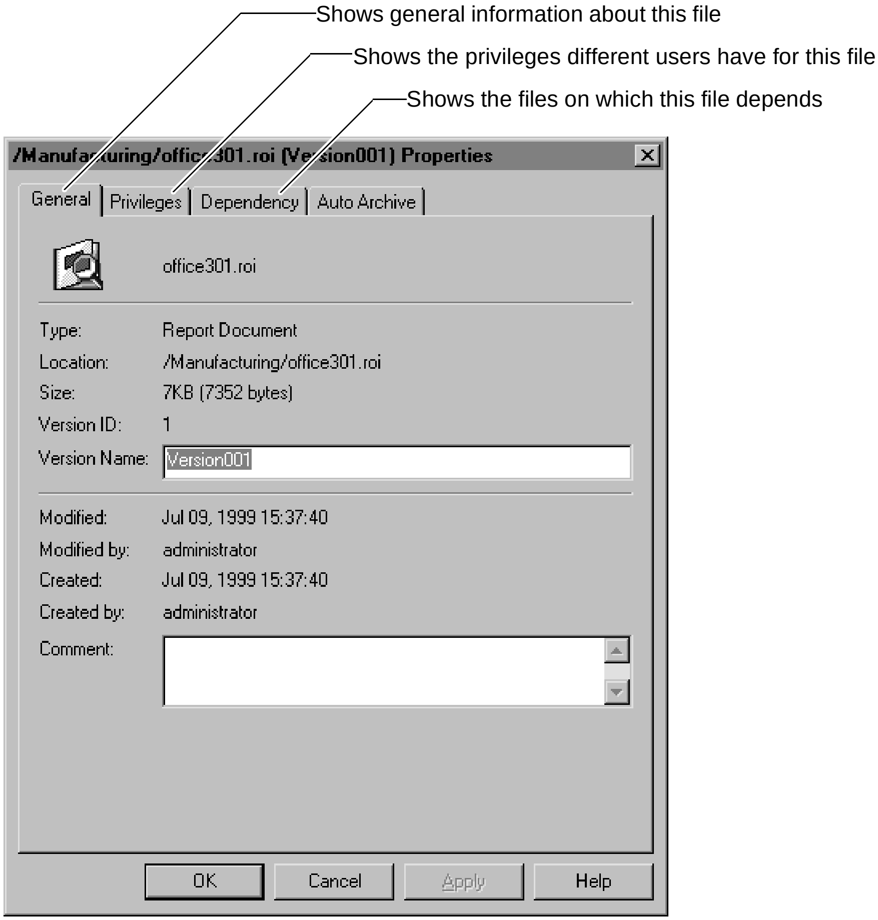
How to inspect the properties of a Report Encyclopedia item

1 Select the item with the properties you want to see.

2 Press the right mouse button and choose Properties from the context menu.

   The Properties dialog box for the item appears. This dialog box displays different information depending on the type of item. The Requests folders, for example, are managed by the system, so you see only general information. If files are highly customized by users, so you see more information about them.

   The following illustration shows the Properties dialog box for a report document.



Deleting Report Encyclopedia items

You can only delete folders and files you create or for which you have been assigned the delete privilege. The delete privilege is assigned by the administrator or another user. Typically, the only folders and files you delete are in your personal folder.

How to delete a Report Encyclopedia folder or file

1 Select the folder or file to delete. You need delete privileges to the selected item. If you delete a folder, items in the folder are deleted as well.

2 Press the right mouse button and choose Delete from the context menu.

If you delete a file, Actuate removes the file immediately unless another file depends on the file you want to delete. If there is a dependent file, Actuate displays a dialog box that specifies the files that are dependent on the file to delete, and asks if you want to delete the file and its dependent files. For more information about file dependencies, see "About file dependencies," later in this chapter.

Report Encyclopedia security

One of the key requirements in the enterprise environment is security. The Report Encyclopedia limits access to folders and files. Access is granted by:

1 The Administrator.

2 The owner, or creator, of a specific folder or file.

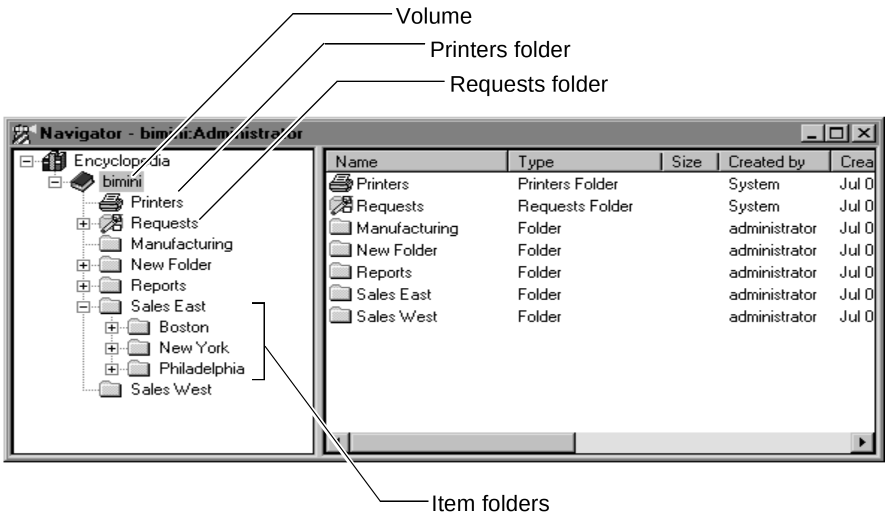
When you connect to a Report Encyclopedia volume, the items you see are those which you have been granted read privilege. For more information about privileges, see "About Report Encyclopedia folder and file privileges," later in this chapter.

Using Report Encyclopedia folders

As a user, the following are types of folders you can access:

- Encyclopedia home folder, that can be accessed by all users
- Item folders, which contain report files and/or other item folders
- Printers folder, which lists the network printers you can use
- Requests folder, which contains information about report requests you submit

The following illustration shows the Report Encyclopedia home folder and the types of folders you work with in the Report Encyclopedia.



Printers folder

The Printers folder lists the network printers available to Report Encyclopedia users. You can inspect and change the properties of each printer to suit your printing requirements. For information about setting printer properties, see "Setting printer properties in the Report Encyclopedia" in Chapter 6, "Printing and distributing a report from the desktop."

Requests folder

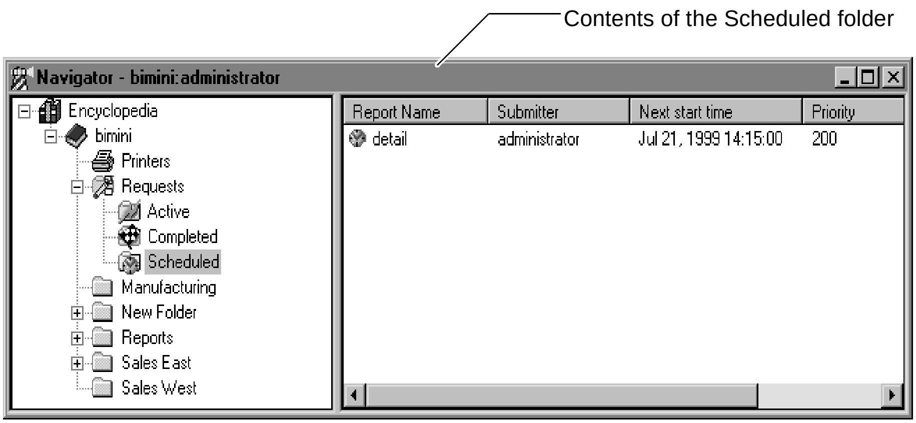
The Requests folder is a system folder, which you access to find the status of report generation requests. If you are using Actuate desktop software such as the Actuate End User Desktop, you can view scheduled requests and create requests. For information about creating report requests, see "Creating report requests in the Report Encyclopedia" in Chapter 4, "Running a report from the desktop."

The Requests folder contains three subfolders, Scheduled, Active, and Completed:

- The Scheduled folder shows requests you scheduled to run at a later date and time.
- The Active folder shows requests you scheduled that are currently in the process queue.
- The Completed folder shows requests that have been processed. These requests are requests you submitted, or requests for reports that other users have asked be sent to you.

If you are using the Actuate Viewer, you see only the Completed folder and requests that have been processed.

The following illustration shows the Scheduled folder containing one scheduled report request.



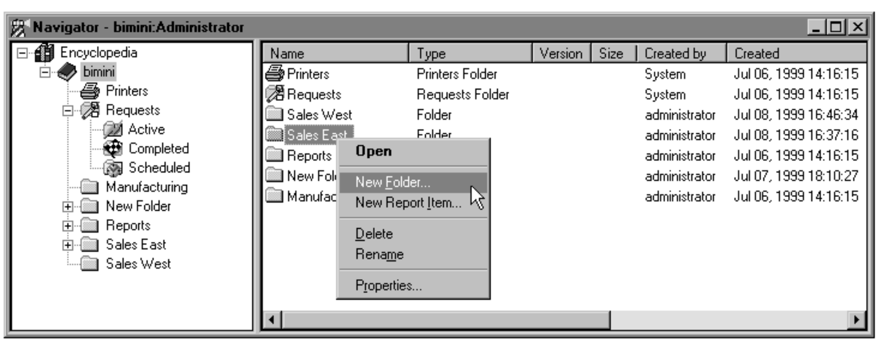
Creating a folder in the Report Encyclopedia

You can create folders in your personal folder and in other folders for which you have been assigned the write privilege. For a folder, the administrator or other users with grant privilege can assign the write privilege.

How to create a folder in the Report Encyclopedia

1 Select the folder that will contain the new folder.

2 Press the right mouse button and choose New Folder from the context menu, as shown in the following illustration.



A new folder appears. The default name is New Folder.

3. Enter the name of the new folder.
4. To make the folder available to other users, assign privileges to specific users.

   For information about assigning privileges on items you create, see “About Report Encyclopedia folder and file privileges,” later in this chapter.

If you do not assign privileges, users have the default privileges the administrator assigned to your privilege template. For information about assigning privileges and privilege templates, see “Using privileges,” later in this chapter.

Using Report Encyclopedia files

As you browse the contents of folders in the Report Encyclopedia, you are likely to see a variety of file types, each with a specific function.

Understanding the different types of files and their functions helps you better manage and use files in the Report Encyclopedia. For information about the types of Report Encyclopedia files, see “About Report Encyclopedia files” in Chapter 1, “Using e.reports on the Web.”

Copying files to the Report Encyclopedia

You can copy files into your personal folder or any folder for which you have been granted the write privilege by the administrator or by another user. You can copy files from a local machine, a network file server, or from another Report Encyclopedia folder.

The Report Encyclopedia recognizes and interacts with Actuate report files. For a list and description of files that the Report Encyclopedia can use, see “About Report Encyclopedia files” in Chapter 1, “Using e.reports on the Web.”

How to copy a file from a local or server machine to the Report Encyclopedia

There are two ways to copy a file from a local or server machine to the Report Encyclopedia. You can use drag-and-drop, main menu, or context menu commands. The following steps describe how to copy a file using context menu commands:

1. Select the folder that will contain the copied file.
2. Press the right mouse button and choose New Report Item from the context menu. You can also choose File→New Encyclopedia Item→Report Item from the main menu.

   The Open dialog box appears.

3 Select the file to copy, then choose Open.

The file name and description of the copied file appears in the right pane of the Navigator.

Once you copy a file to the Report Encyclopedia, do the following:

- Set the file dependencies, if appropriate. For information about setting file dependencies, see "About file dependencies," later in this chapter.
- Assign privileges to users, if you want others to access the file. If you ignore this option, users have the default privileges the administrator assigned to them. For information about assigning privileges on items you create, see "About Report Encyclopedia folder and file privileges" in Chapter 1, "Using e.reports on the Web."

Copying and moving files within the Report Encyclopedia

When you copy or move a file from one Report Encyclopedia folder to another, all the original file's properties—including privileges—apply to the file that is copied or moved.

How to copy a file from one folder to another

1. Press Ctrl and select the file to copy.
2. Drag the file to the destination folder.

How to move a file from one folder to another

1. Select the file to move.
2. Drag the file to the destination folder.

Copying files from the Report Encyclopedia

You can copy report files from the Report Encyclopedia to a local machine or network file server. If you copy a report document and you plan to open it on your local machine, make sure you copy the associated report executable as well.

How to copy files from the Report Encyclopedia to a local system or network file server

1. Open the Windows Explorer or File Manager.
2. Drag the file from the Navigator window to the destination folder in Explorer or File Manager.

About Actuate open server reports

Using the standard e.Reporting Server users can view reports and other types of files from the Report Encyclopedia. With the Advanced e.Reporting Server, Actuate extends the Actuate open server functionality to handle report executables and report documents from third-party vendors. Actuate calls these third-party reports open server reports. For example, if a Seagate Crystal report or Sqribe SQR report is stored in an Advanced e.Reporting Server's Report Encyclopedia, users can run and print these open server reports.

To run or print open server reports, report server administrators configure the Report Encyclopedia in a manner similar to Actuate report files such as report executables files .ROX, report output files, .ROI or HTML files, and report parameter files .ROV. For information about running open server reports, see Chapter 4, "Running a report from the desktop."

The report server uses software called an open server driver to run or print an open server report. The Advanced e.Reporting Server supplies open server drivers for Seagate Crystal reports and SQRIBE SQR reports. For information about creating other open server drivers, see *Integrating Actuate e.Reporting Server* distributed with the Actuate Software Development Kit.

To use the report server open server functionality, the Report Encyclopedia must be configured to recognize the report file types used by the open server reports. The Crystal report file types predefined by the Advanced e.Reporting Server are:

- RPX is defined as Crystal executable .RPT file
- RPW is defined as Crystal web report .RPW file
- RPT is defined as Crystal report .RPT file

The Sqribe report file types predefined by the Advanced e.Reporting Server are:

- SPF is defined as Sqribe report .SPF file
- SQR is defined as an uncompiled Sqribe report .SQR file
- SQT is defined as Sqribe report .SQT file

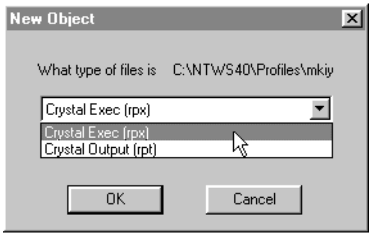
For information on configuring Report Encyclopedia open server file types, see Chapter 4, "Managing report server resources," in *Administering the Report Encyclopedia*.

Importing open server report files

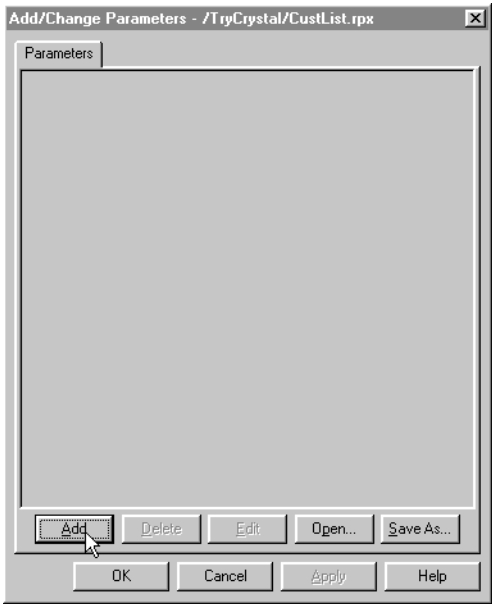
After the report server administrator defines a open server file type, you can import non-Actuate report files into the Report Encyclopedia and use the report server's open server functionality to create report requests.

When you import a non-Actuate report file, The report server displays dialog boxes needed to correctly import the file. The developer of the open server report must provide you with the parameters and other information needed to import the file.

When you add an open server file to the Report Encyclopedia, the following dialog box might appear if there are multiple open server file types defined with the same file extension. Using the dialog box, you can select the Report Encyclopedia file type to assign to the file. In this example, the .RPT file extension can be either an .RPT or .RPX Report Encyclopedia file type.



After the administrator has specified the open server file type, the following dialog box appears to specify parameters specific to the open server report.



Either choose Add to define parameters and default values individually or choose Open to specify an Actuate .ROV file that contains a list of parameter and default values.

When users specify parameters, they cannot override hidden open server parameters. If a user specifies a parameter that attempts to override a hidden parameter, the report generation fails.

When creating a parameter that overrides an existing parameter, the new parameter the same type as the existing parameter. For example, you can create a string parameter for the report that overrides the string parameter specified by the file type. If there is a mismatch between parameter format types, any open server report generations fail.

About Sqribe open server files

The Actuate Sqribe report open server driver handles only Sqribe compiled, executable file type .SQT that are analogous to Actuate .ROX files. Actuate's Sqribe open server driver for does not support Sqribe .SQR report files.

The Sqribe open server driver can generate the following output file types from a Sqribe .SQT report:

- Output file type .SPF proprietary Sqribe output (analogous to .ROI)
- Output file type .SQW web format output (analogous to .ROW). (not printable)
- Output file type .TXT A plain text file

Because Sqribe reports are compiled Sqribe ask directives are not processed, and required input directives are processed.

Using images with Sqribe reports

For Sqribe reports that use images, the images are not part of the compiled .SQT file. They must be loaded and incorporated into web output.

When importing the images used with Sqribe reports, you must create a dependency between the .SQT and the image file.

Images are not supported for proprietary Sqribe .SQW file downloads.

About file dependencies

Some report files depend on the existence of others. In order for certain operations to execute successfully, dependent files must be able to access the files they depend on. The most common example is the association between a report document and a report executable. When you open a report for viewing or printing, Actuate runs the report executable from which the report was generated.

If you try to delete an executable from the Report Encyclopedia, Actuate displays a dialog box that specifies the files that are dependent on the executable, and asks if you want to delete the executable and its dependent files.

The following table lists the dependencies among file types.

This file ...	Depends on ...
Report document	Report executable
Report parameter values	Report executable

When the report server sets up file dependencies

The dependency between a document and an executable is set automatically when you run an executable in the Report Encyclopedia. Similarly, the dependency between a parameter values file and an executable is set automatically when you create and save a parameter values file in the Report Encyclopedia.

When you need to set up file dependencies

If you copy a report document from a local system to the Report Encyclopedia, you need to take the following steps:

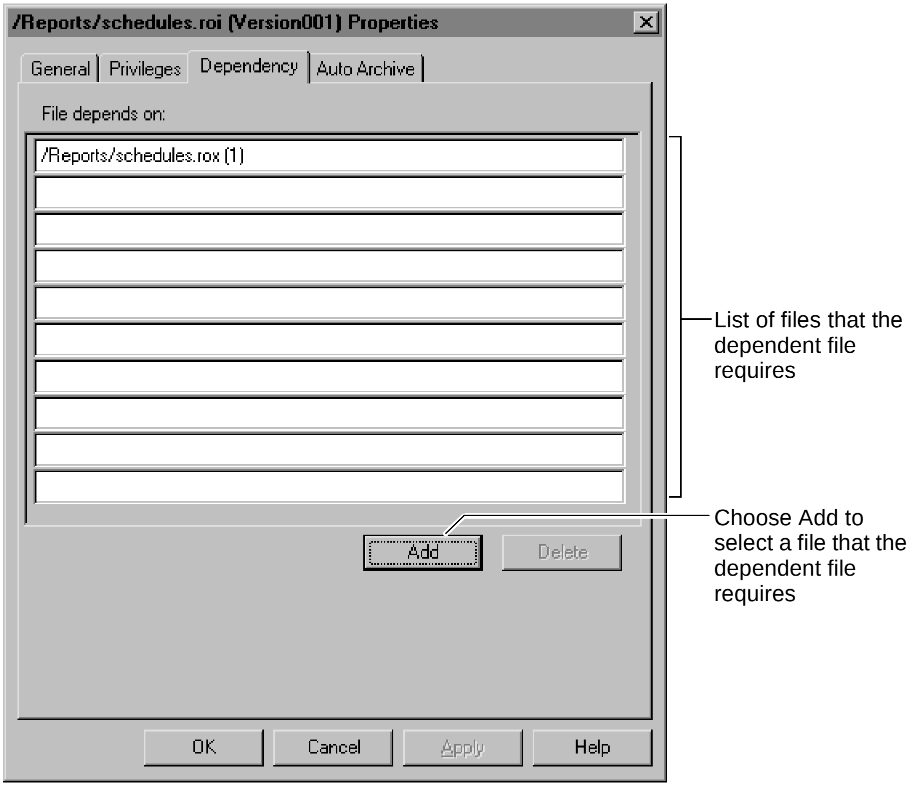
1. Copy the report to the Report Encyclopedia.
2. Copy the associated executable.
3. Set up the dependency between the files. For instructions, see "How to set file dependencies," in the next section.

If you omit steps 2 and 3, you will not be able to open the report. The alternative is to bundle the executable with the report. Then, all you need to do is copy the report to the Report Encyclopedia. For information about bundling an executable with a report, see "Distributing a report from your desktop" in Chapter 6, "Printing and distributing a report from the desktop."

How to set file dependencies

1. Select the file whose dependencies you want to set. For example, a report document depends on the executable. To set the dependency, select the report document.
2. Press the right mouse button and select Properties from the context menu.

   The Properties dialog box appears with the General page open.
3. Choose the Dependency tab to display the Dependency page, shown in the following illustration.



4 Choose Add.

The Encyclopedia Browser appears.

5 Find and select the file that the dependent file requires, then choose OK.

The selected file appears in the File Depends On list.

6 If the dependent file depends on additional files, repeat steps 4 and 5 until you have selected all the files.

7 Choose OK.

Using privileges

Typically, you assign privileges on an item only if you want to make sure certain users have particular access to it. If you do not set privileges on an item you create, the report server applies the default privileges specified in your privilege template. For more information about privilege templates, see “About privilege templates” later in this chapter.

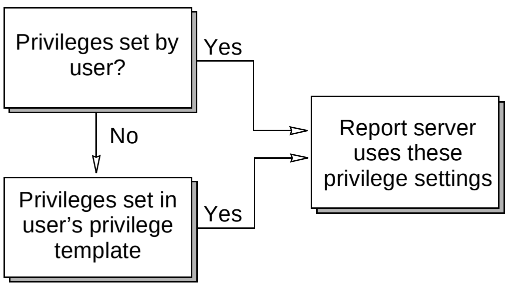
How the report server assigns privileges to items you create

When you create a folder or file in the Report Encyclopedia, the report server assigns privileges to those items in the following order:

1 The privileges you explicitly grant to other users. You need grant privilege on the object to change privileges on the object.

2 The privileges specified in your privilege template.

The following conceptual diagram summarizes how the report server assigns privileges to items you create.

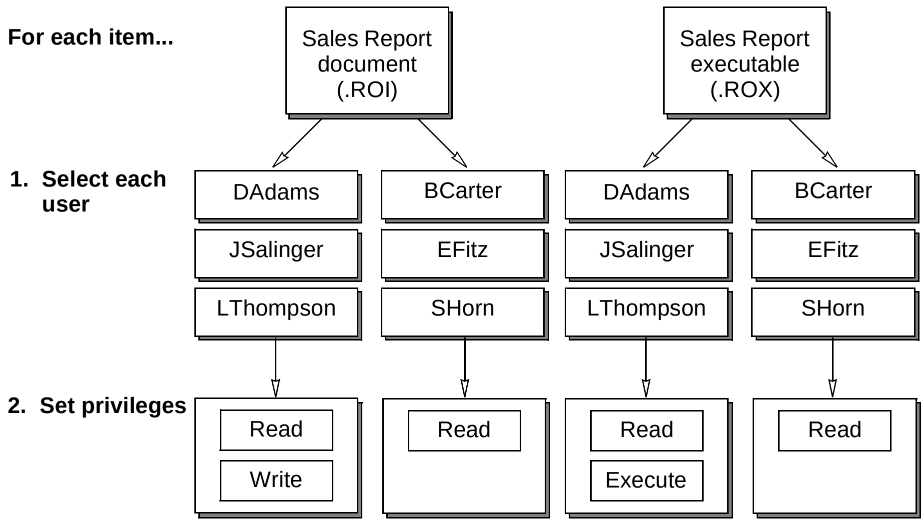


Assigning different privileges to different users

For each folder or file you create, you can assign different privileges to different users. For example, you might want to allow your team members to view a sales report you generated, as well as run the associated report executable. In this case, you would grant to your team members the read and write privileges on the report document, and grant read and execute privileges on the associated report executable.

You might want to allow members of another team only to view the report. In this case, you grant to those users only the read privilege on the report document and the associated report executable. You must also assign the read privilege on the associated report executable because Actuate runs the report executable each time you open the report document for viewing or printing.

The following illustrates the above scenario. DAdams, JSalinger, and LThompson are your team members.

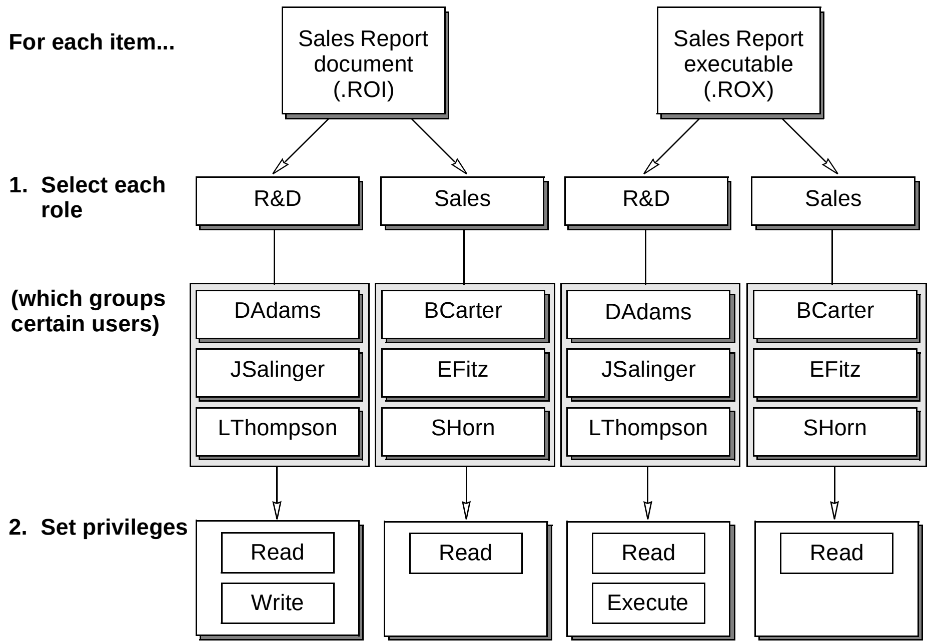


Assigning privileges to groups of users

A quicker way to assign the same folder or file privileges to a group of users is to assign privileges to a role. Roles are created by the administrator to group users that might require the same privileges on items. Using roles lets you assign and maintain privileges more consistently and with less effort.

Only the administrator can create roles. Contact the administrator if you want to know which users are included in the different roles, or if you need additional roles. For example, the administrator might create a role called Sales that groups all the sales representatives, and a role called R&D that groups all the engineers.

The following illustration shows how different privileges are granted to roles. If you compare the following illustration with the previous one, you will see the convenience of assigning privileges to roles—instead of selecting six users for each file, you select two roles for each file.



How to assign privileges for a folder or file

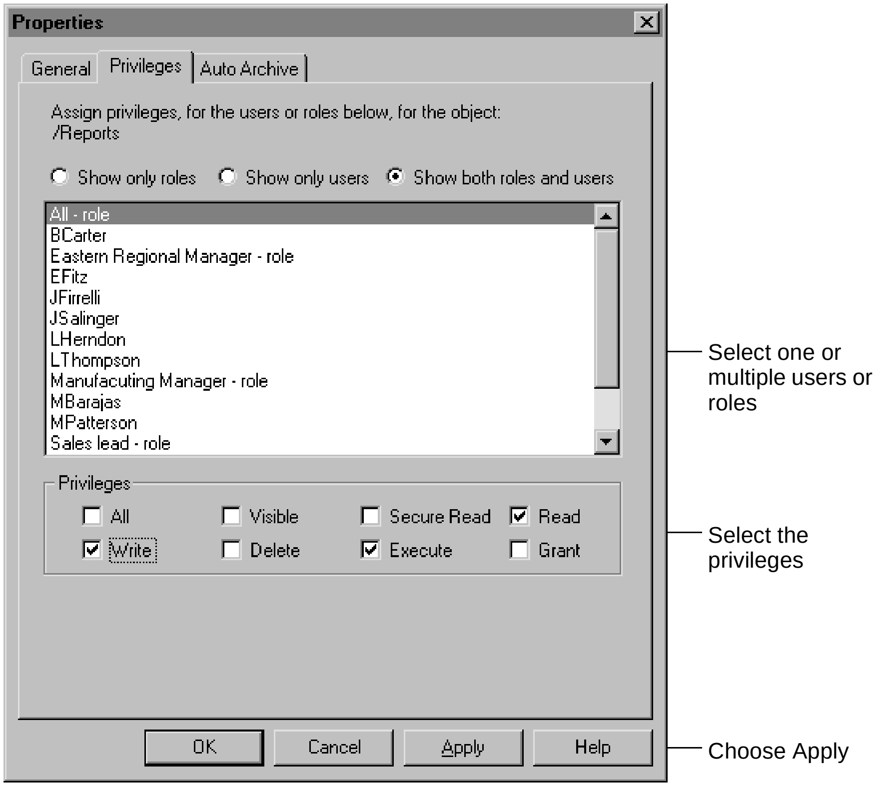
1 Select the folder or file for which you want to set privileges.

2 Press the right mouse button and choose Properties from the context menu.

The Properties dialog box for the item appears.

3 Choose the Privileges tab.

The Privileges page displays the list of users and roles from which you can select to assign file or folder privileges. Users and roles are created by the administrator.



4 Select a user or role. To select multiple users or roles, press Ctrl as you click each name.

5 Select the privileges to assign to the selected users or roles.

6 Choose Apply to save the setting.

7 Repeat steps 4 through 6 until you have assigned privileges to all the users or roles to whom you want to give file or folder access.

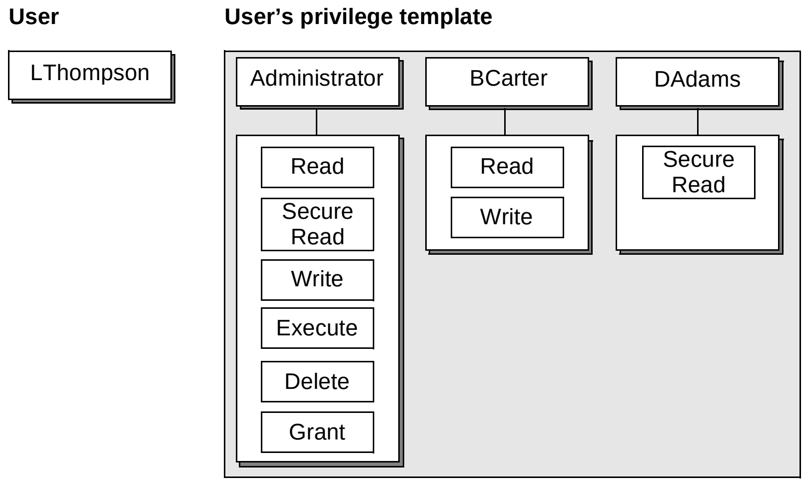
8 When you have finished assigning privileges on the folder or file, choose OK.

About privilege templates

Every user has a privilege template that specifies the privileges that other users have to items he or she creates. The default privilege template assigns the full set of privileges to the creator of the item and the administrator, and no privileges to other users.

If you are a user logged into the Report Encyclopedia, you can change the privilege template for items you create. For example, you can change your privilege template so your manager or your assistant to always have read and write privileges to items you create. To change your privilege template use the same steps as you would to change the privileges for s specific file or folder in the Report Encyclopedia.

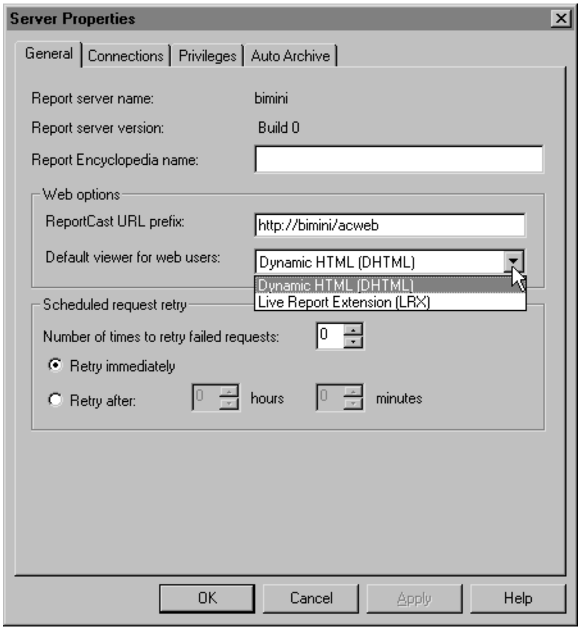
The following illustration shows an example of a privilege template for a user, LThompson. In the example, the privilege template assigns all privileges to the administrator, read and write privileges to user BCarter, and the read privilege to user DAdams. These privileges apply to all items created by LThompson.



Report Encyclopedia viewing modes

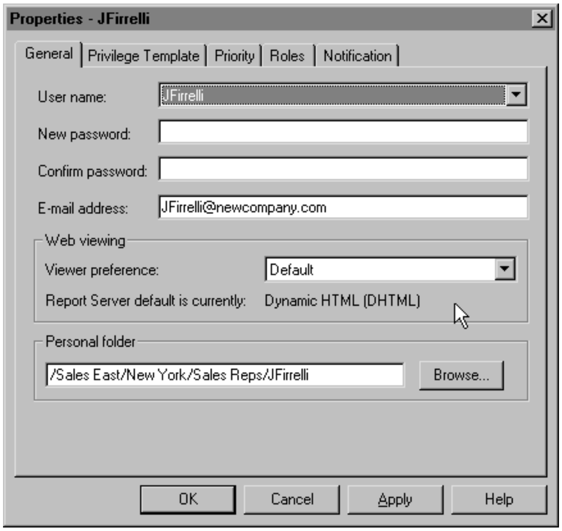
The Report Encyclopedia default Web-viewing mode for Actuate reports is specified in the Server Properties dialog box. Administrators can specify either the DHTML or LRX. For information about the viewing modes, see "Report viewing modes" in Chapter 1, "Using e.reports on the Web."

To display the Server Properties dialog box, select the Report Encyclopedia folder and choose File → Properties, or select Properties from the Encyclopedia's context menu. An administrator can change the viewing mode, but other users can only see the current setting.



User viewing mode

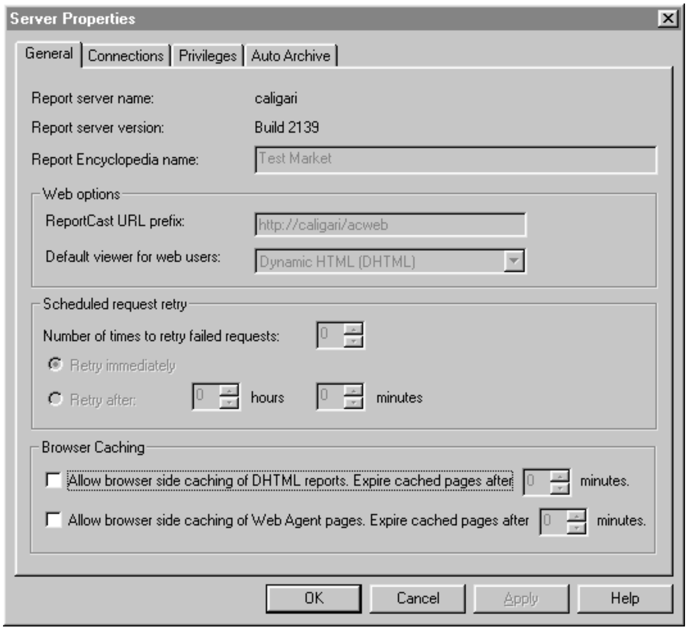
You can specify Web-viewing mode for Actuate reports for individual users. Select Default, DHTML, or LRX. The Default setting uses the Report Encyclopedia setting. If the setting differs between the user and the Encyclopedia, the user's viewing mode is used.



Viewing Report Encyclopedia request retry settings

To display the Server Properties dialog box, select the Report Encyclopedia folder and choose File → Properties, or select Properties from the Encyclopedia's context menu.

From the Server Properties dialog box, choose the General tab. Only administrators can change the request retry settings.



Using Report Encyclopedia auto-archive

Using the Report Encyclopedia auto-archive features, administrators and users specify parameters to automatically delete files such as Actuate reports, open server reports, and other documents stored in the Report Encyclopedia. Actuate can automatically delete Report Encyclopedia files based on the age of the file, a specific date, or the number of versions of a file. As part of auto-archive, users can specify that a file is archived before deletion.

The following lists the auto-archive settings for the Report Encyclopedia. The Report Encyclopedia auto-archive rules are overridden by setting auto-archive rules on a folder, file, or report generation request.

Administrators can set the auto-archive policy for files in the Report Encyclopedia. Administrators can:

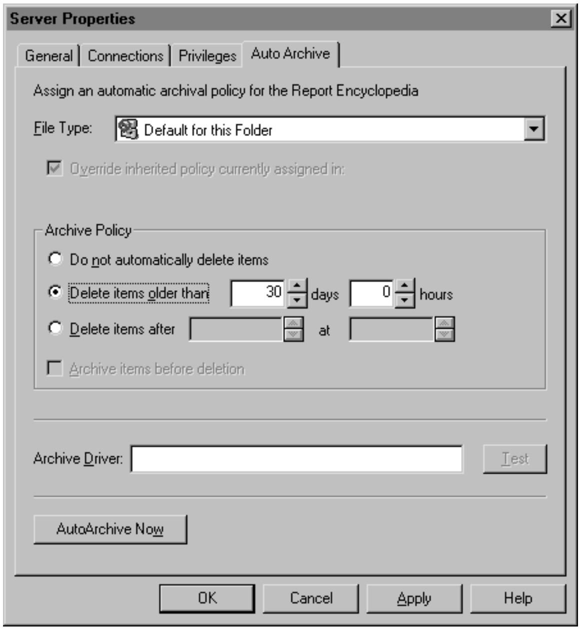
- Set the rule for all the files in the Report Encyclopedia.
- Set a rule for a specific file type.
- Specify the archive driver used for archiving files.

Viewing Report Encyclopedia auto-archive rules

Administrators set the auto-archive rules for the Report Encyclopedia from the Server Properties dialog box. Only an administrator can set the Report Encyclopedia auto-archive rules. The items in the Server Properties dialog box are disabled for users.

1 To display the Server Properties dialog box, select the Report Encyclopedia folder and use File → Properties, or select Properties from the Encyclopedia folder's context menu.

2 Choose the Auto Archive tab.



3 In the Auto Archive tab, select a file type from the File Types list.

The File Types box lists the default file type and all defined open server file types. For information about open server file types, see "About Actuate open server reports," earlier in this chapter.

The Default for this File item defines the auto-archive rules for all the files in the Report Encyclopedia that do not have a specified auto-archive rule.

4 Select the auto-archive rule for the selected file type.

5 Select and set auto-archive rules for file types as necessary.

6. Specify the archive driver in the Archive driver field. The archive driver specified for the Report Encyclopedia is the driver used to archive Encyclopedia files. If you specify an archive driver:
   - Choosing the Test button tests the archive driver and archive tool. The button is disabled if an archive driver is not specified or if the user is not an administrator.
   - Choosing the Archive Now button starts an auto-archive process. The button is disabled if the user is not an administrator.

About folder and file auto-archive rules

The auto-archive rules for folders or files override Report Encyclopedia settings. You can see the auto-archive rule for a folder or file in the Auto Archive tab of the Properties dialog box. If the auto-archive rules are inherited from another folder or the Encyclopedia, the rules are displayed in the dialog box but the controls are disabled. The dialog box also displays the folder that the Report Encyclopedia uses for the default rule.

If you have the appropriate privileges, you can override the default. If you specify auto-archive rules for a folder, the rules become the default rules for folders and files contained in the folder and in any subfolder within the starting folder.

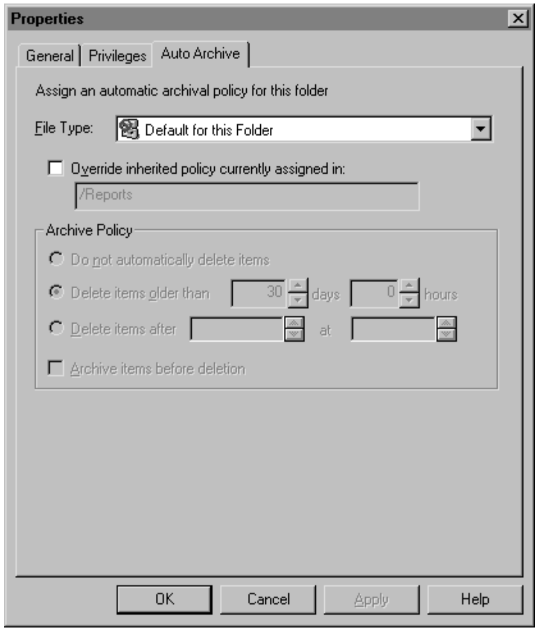
The archive information for reports and other files shows the projected expiration date.

If the administrator has enabled archiving, you can specify whether or not to archive files as part of setting the auto-archive rules. The archive driver specified for the Report Encyclopedia is the driver used to archive Encyclopedia files.

Setting folder auto-archive rules

Users with delete privilege on the folder can set a folder's auto-archive rules from the folder's Properties dialog box. This overrides rules set higher in the folder hierarchy.

1. To display the Properties dialog box, select the folder and choose File → Properties, or select Properties from the folder's context menu.
2. Choose the Auto Archive tab.



3 In the Auto Archive tab, select a file type from the File Types list.

The File Types list box lists the default file type and all defined open server file types. The Default for this Folder item defines the default auto-archive rules for all the folders and files in the current folder. For information about open server file type, see "About Actuate open server reports," earlier in this chapter.

An icon appears next to the file type if the auto-archive rule is defined by the current folder. If you select a file type with an inherited rule, the override option is not selected, and the auto-archive rule is displayed but is not enabled.

4 In the Auto Archive tab, enable the Override option to enable the Archive Policy items.

5 Enter the auto-archive rule for the selected file type.

If archiving is available, you can select to archive files before they are deleted based on the auto-archive rules.

6 Select and set file types and auto-archive rules as necessary.

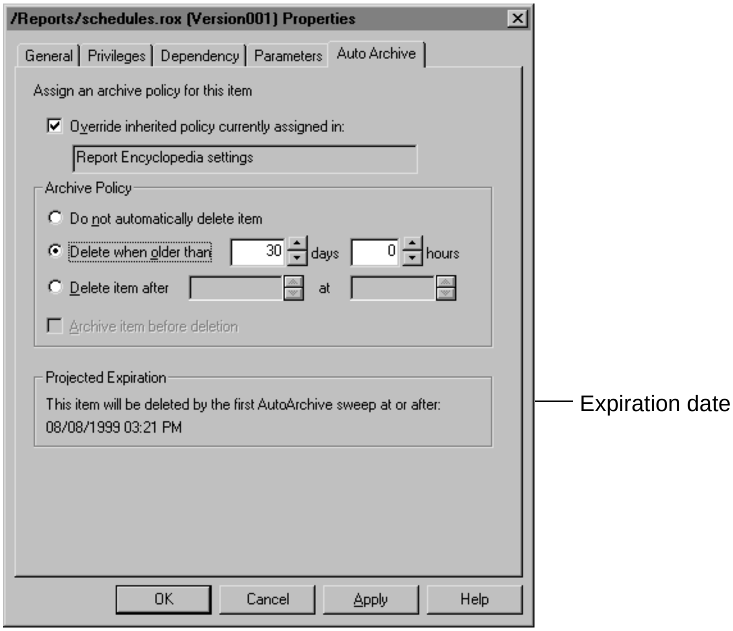
7 Choose OK to save the rules.

Setting file-specific auto-archive rules

Users with delete privilege on a file can set a file’s auto-archive rules from the file’s Properties dialog box. This overrides any rules set in the file’s folder hierarchy.

1 To display the Properties dialog box, select the file and choose File → Properties, or select Properties from the file’s context menu.

2 Select the Auto Archive tab.



3 In the Auto Archive tab, select the Override option and enter the auto-archive rule.

If you select a file with an inherited rule, the override option is not selected, and the auto-archive rule is displayed but is not enabled.

If archiving is available, you can select to archive files before they are deleted based on the auto-archive rule.

The projected expiration date is displayed in the dialog box.

4 Select and set file types and auto-archive rules as necessary.

5 Choose OK to save the rule.

Chapter

3

Viewing a report from the desktop

This chapter contains the following topics:

- Opening and viewing a report
- Moving around in a report
- Using links to other Windows applications
- Zooming
- Using screen arrangement options
- Using online help in a sample report
- Using context menus while you view a report

Opening and viewing a report

Opening and viewing a report that is stored in a file system (on a stand-alone machine or a network file server) or in the Report Encyclopedia involves a somewhat different sequence of tasks. The following sections describe opening and viewing a report stored in a file system and then in the Report Encyclopedia.

Once the report is open, the viewing features are the same whether you view a report stored in the file system or in the Report Encyclopedia. Actuate uses the last zoom setting you set as the default magnification when you open a report document. For information on using the Zoom feature, see “Zooming” later in this chapter.

Opening and viewing a report in a file system

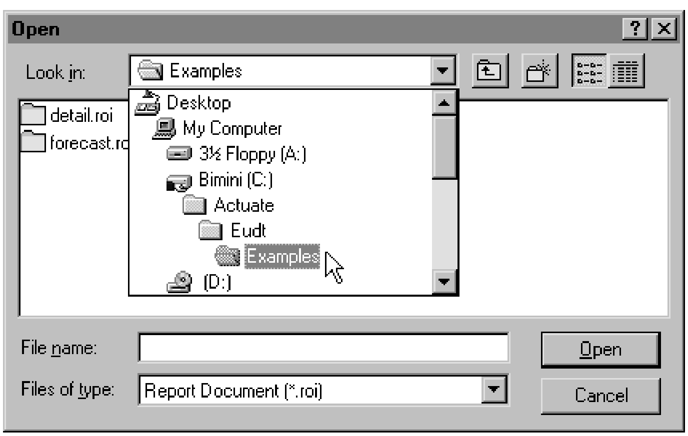
To help you get started, the Actuate products include sample reports. Viewing these reports introduces you to the active viewing features, unique to Actuate reports. We will be using DETAIL.ROI as an example in this chapter.

How to open a sample report from a file system

1 Choose File→Open.

The Open dialog box appears.

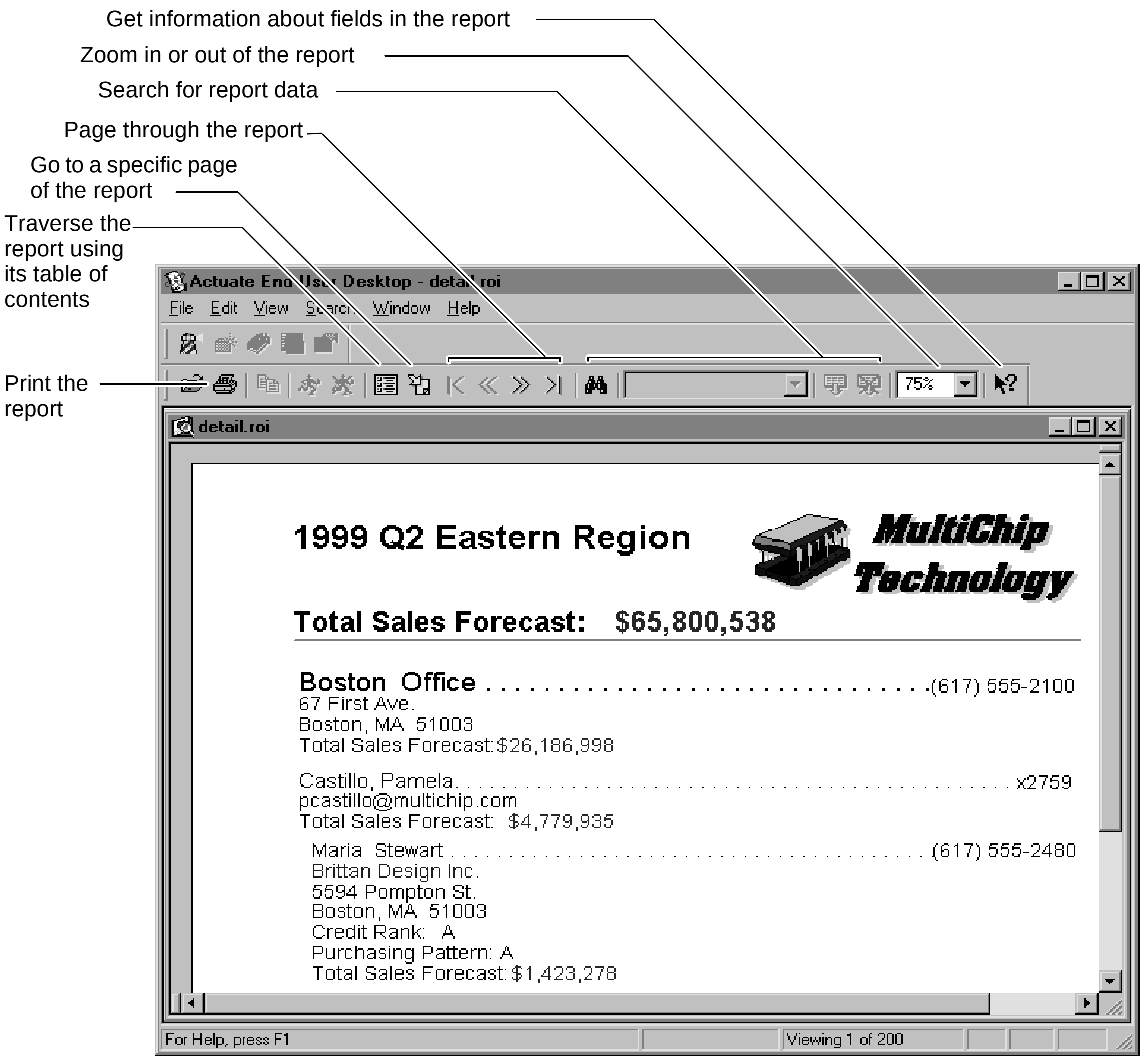
2 From the Files of Type list, choose Reports (*.ROI) to find the sample report, DETAIL.ROI. Go to the Actuate Examples directory. For instance, the default examples directory for the End User Desktop is C:\Actuate\Eudt\Examples.



3 Select DETAIL.ROI.

4 Choose Open.

DETAIL.ROI opens. The following illustration shows the first page of DETAIL.ROI in Actuate End User Desktop. With this sample report, you can explore many of the viewing capabilities.



Use the split box at the top of the vertical scroll bar or the left of the horizontal scrollbar to create a split window. View different parts of the report simultaneously with a split window. To remove splits from a window, double-click the split bar.

Viewing a Report Encyclopedia report

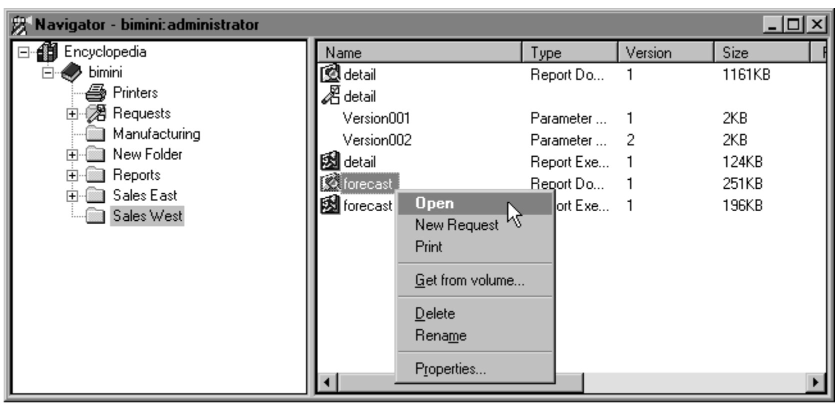
You can view a report stored in a Report Encyclopedia if you have access to the Report Encyclopedia and if you have read privilege for the report. For more information about privileges, see “About Report Encyclopedia folder and file privileges” in Chapter 1, “Using e.reports on the Web.”

How to open a report in a Report Encyclopedia for viewing

1. Log on to the Report Encyclopedia if you have not already done so.

   The Navigator appears.

2. Locate and select the report you wish to open.
3. Press the right mouse button to access the context menu.
4. Choose Open from the context menu, as shown in the following illustration.



The report appears. Depending on the settings in the Report Encyclopedia, Actuate might start your browser and have you log on to the Report Encyclopedia to view the report in DHTML format. For information about viewing DHTML reports, see “Viewing reports in DHTML” in Chapter 1, “Using e.reports on the Web.”

HTML Reports in the Report Encyclopedia

An HTML report document file (.ROW) is stored in the Report Encyclopedia and created with the report server, Developer Workbench, End User Desktop, or Administrator Desktop from a report executable (.ROX). You can view an

HTML report using a web browser without using the Actuate LRX (Live Report Extension).

To view an HTML report, open it the same way you would a report document (.ROI).

Viewing open server reports

View an open server report as you would any other report in the Report Encyclopedia. If the report requires special software to view the report, that software must be installed on the local machine. For example, if a Crystal or SQR report is in the Report Encyclopedia and you want to view it in the native format, you must install the appropriate viewing software on your machine. The Report Encyclopedia does not support demand paging when viewing open server reports. The entire report is transferred to the local machine for viewing.

If you have the advanced e.Reporting Server, the Actuate open server report functionality extends the Actuate Reporting System to create and print report documents from third-party vendors called open server reports.

Moving around in a report

There are a number of ways to move around in an Actuate report. You can:

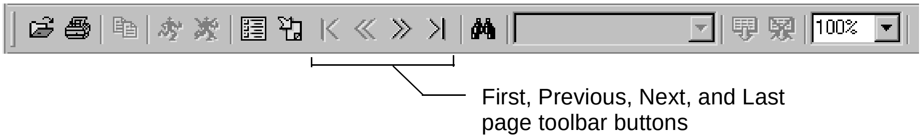
- Page through the report sequentially, or go to the first or last page using the paging commands.
- Go to a specific page by specifying a page number.
- Use hyperlinks, if provided by the report developer, to go from one part of the report to another part in the same or different report.
- Use the report's table of contents to traverse the content hierarchy.
- Use the search feature to find and go to specified report data.

This section describes all the techniques for moving around in a report except the search feature. For more information about searching for report data, see Chapter 5, "Searching for and exporting report data from the desktop."

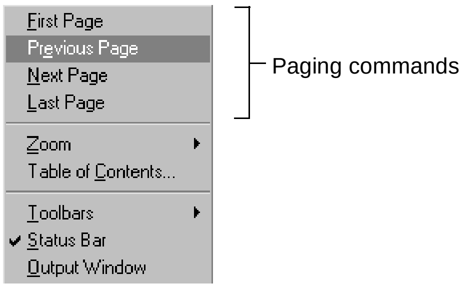
Using the paging commands

The View menu includes various paging commands, first page, previous page, next page, and last page. Actuate reports store data in a highly compressed form. It is possible to move very quickly through large Actuate reports. Paging sequentially through the report is an option, but it is more convenient and faster to choose specific paging commands. Use either toolbar buttons or menu items to access the paging commands.

Paging buttons in a sample toolbar



Paging commands in a sample View menu



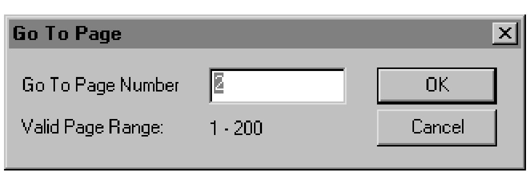
Using Go To

If you happen to be familiar with the page layout of the report or you are working from a printout to find particular report pages, use Search→Go To or the Go To Page button to access a specific page by number.

Go To Page button in a sample toolbar

Go To command in the Search menu

Go to Page brings up a dialog box where you type the number of the page to display.



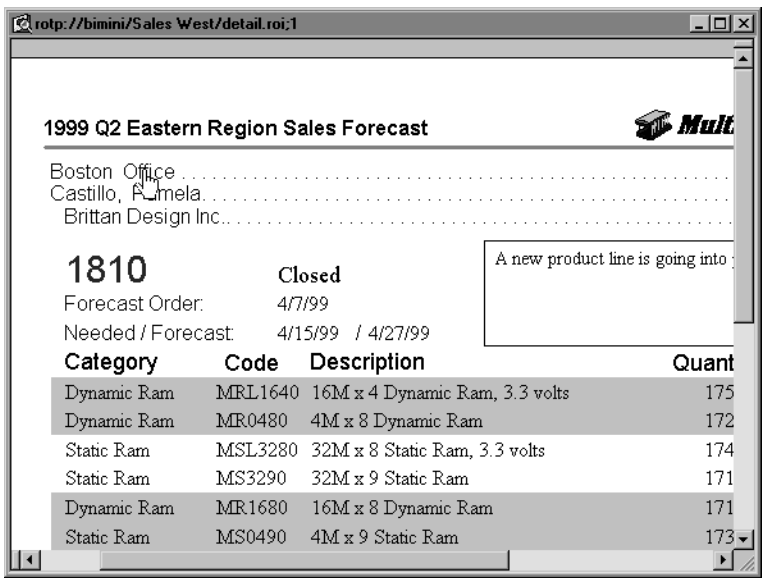
Using hyperlinks

During the design process, the report developer has the option to provide hyperlinks in any Actuate report. Hyperlinks make it easy to move from information in one part of a report to related information in another part of a report. Not all reports include hyperlinks.

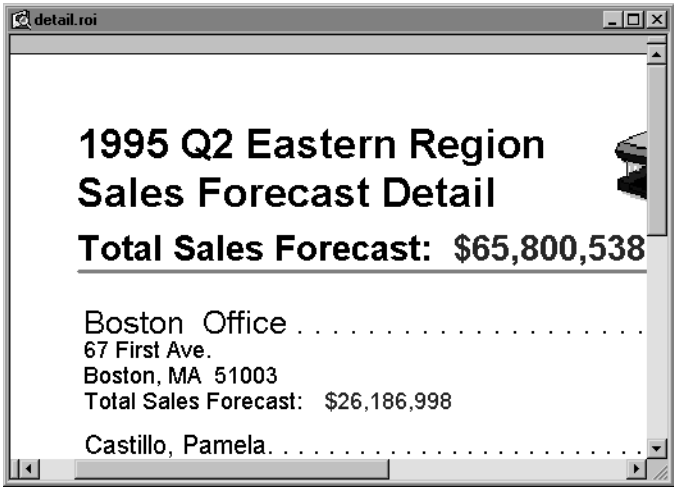
When you click on a hyperlink in a report document that links to another report document, the linked document uses the zoom setting of the document containing the hyperlink. For information on using the Zoom feature, see “Zooming” later in this chapter.

How to use a hyperlink

1 Pass the mouse over a hyperlinked field. The cursor changes to a small hand to show that the field contains a hyperlink. In the following illustration, the hyperlink for “Boston Office” is active. Look on page 2 of DETAIL.ROI to find this example. Clicking the hyperlink takes you directly to the main entry for the Boston Office.

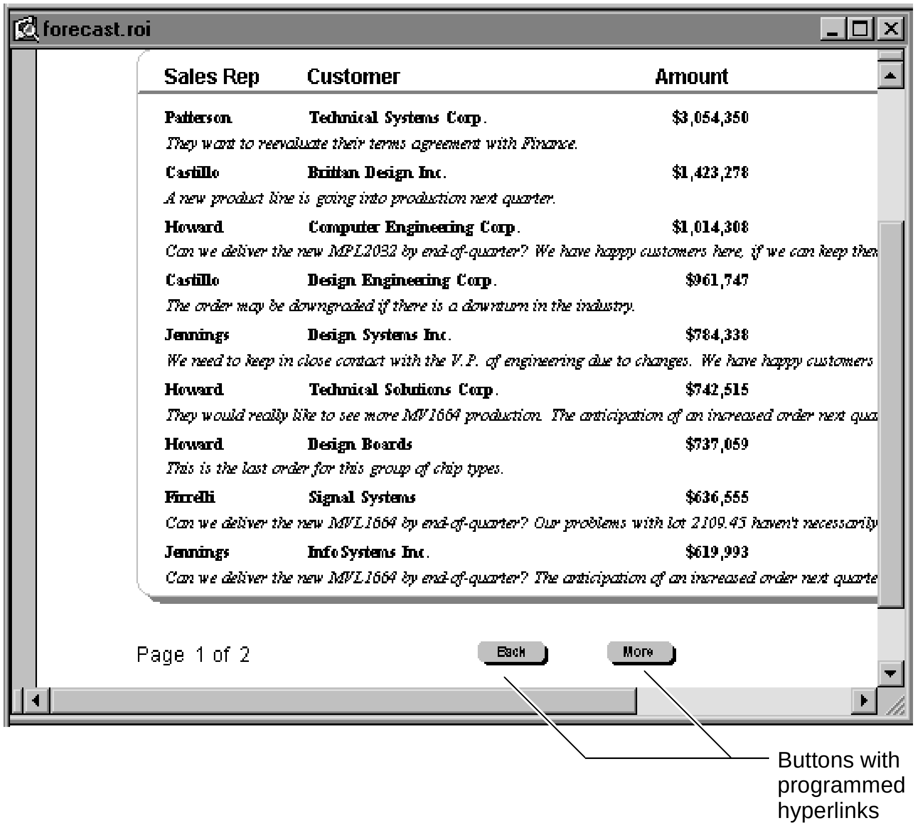


2 Click the hyperlinked field to go directly to the related field. The following illustration shows the field to which the hyperlink connects.



Other hyperlink techniques exist in some reports. For example, each section on a summary page in a report can be linked by a More button to a detailed section of the report. In the more detailed report, the developer can insert More and Back buttons to facilitate navigating through the pages of that part of the report. The following illustration shows a page of FORECAST.ROI with More and Back buttons.

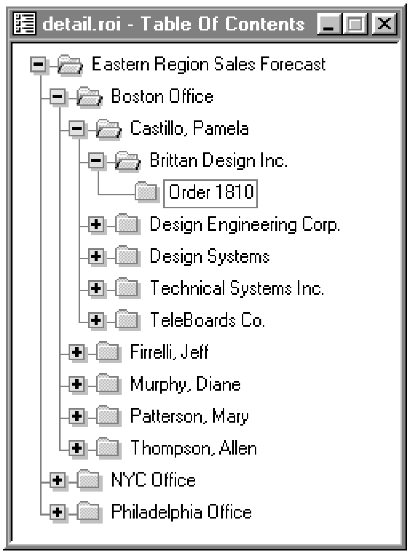
To see several examples of hyperlinks, open the FORECAST.ROI and work with the hyperlinks provided on pages 1 and 2 of that example report.



Some of the hyperlinks in FORECAST.ROI go to the sample report DETAIL.ROI. If you select a hyperlink that goes to DETAIL.ROI and it is not available, you see messages saying DETAIL.ROI cannot be opened.

Using the table of contents

Reports typically contain a generated table of contents. You can view the table of contents with sections collapsed or expanded depending upon what level of detail you want to see. The following illustration shows the table of contents, partially expanded, for the sample report, DETAIL.ROI.



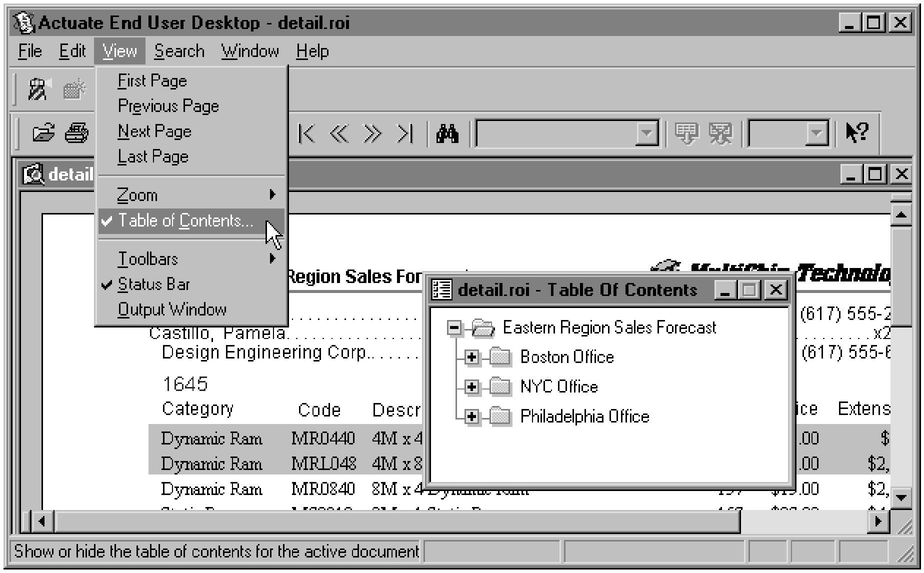
As the table of contents for DETAIL.ROI shows, the Eastern Region Sales Forecast includes three offices. Each office includes a group of sales representatives and each of those representatives has a group of customers. Each customer, in turn, has one or more orders.

In some cases, the report design includes a table of contents with additional items to highlight particularly important sections.

How to access the report's table of contents

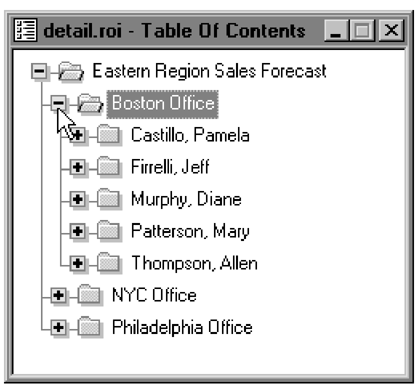
Choose View→Table of Contents, or press the TOC icon.

The table of contents for the report appears. The following illustration shows the table of contents for the sample report, DETAIL.ROI.



How to use the report's table of contents

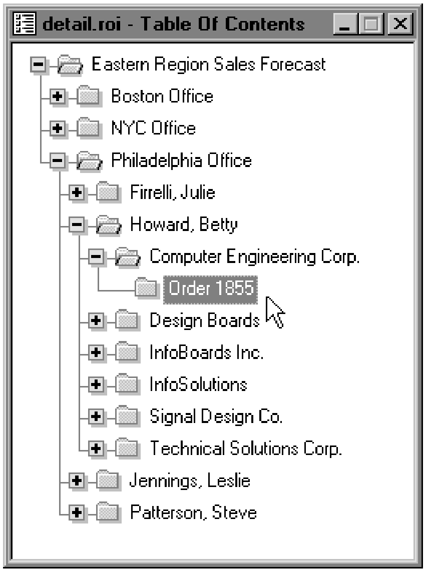
1 To expand the table of contents to show more levels of information, click +. The following illustration shows the Boston Office folder expanded to display sales representatives in that office.



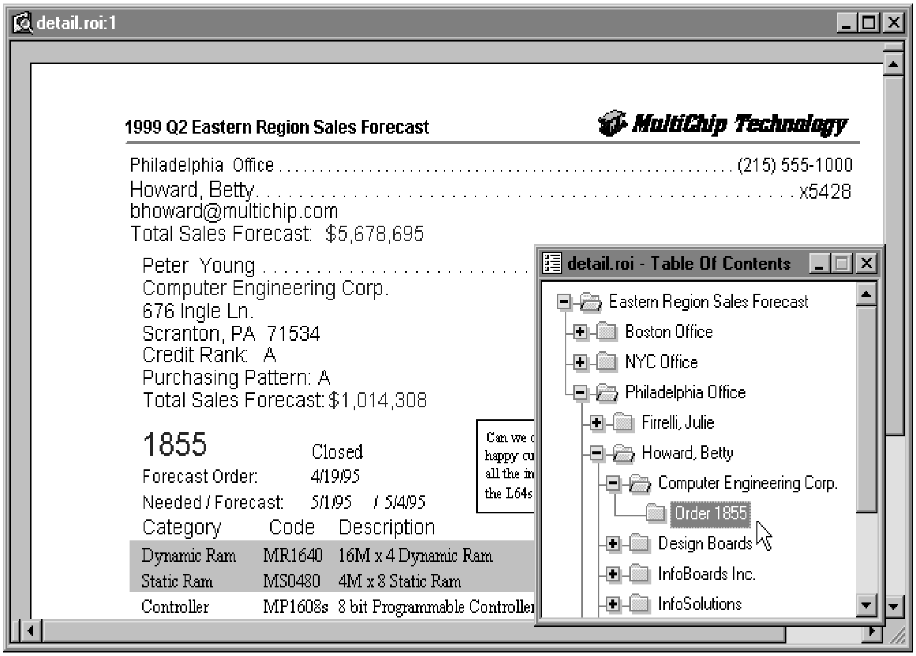
2 To collapse the table of contents to show fewer levels of information, click -.

How to go to an item displayed in the table of contents

Double-click the item in the table of contents.



The report displays the chosen item.



Using links to other Windows applications

Actuate reports can display and manipulate data from Windows applications that support Object Linking and Embedding (OLE). For example, report developers can use OLE to link a Word document, an Excel graph, a spreadsheet, or a Paintbrush picture to an Actuate report. What the developer is able to provide depends to some degree on the particular OLE object and the applications installed on your computer. For example, if a report contains a link to an Excel graph, the graph appears only if Excel is installed on your computer. Otherwise, a grey box appears in place of the graph.

About linked and embedded objects

During the report design phase, the report developer has the option to link or to embed objects such as Excel spreadsheets or Paintbrush pictures to the report design. If the data is in the form of a linked OLE object, the data remains in a file maintained by the application that created it. In that case, the Actuate report contains a reference to that file. If the object is embedded, the data itself is in the Actuate report.

Linked objects can be used by several applications, but the data such as a spreadsheet is kept in one place. Embedded objects are not shared, requiring more effort to maintain updated data.

Editing linked and embedded objects

Depending upon the application used to create the original object, it is possible to manipulate the linked object in the report. For example, if the linked object is an Excel bar graph, printing or viewing the data in a variety of ways, such as a pie chart or a ribbon graph, is an option.

Any change in the view is for that session only. The change is not stored or saved in the original document. Nor are you able to save this variation in the Actuate report. A linked OLE object is external to the report you are viewing.

About OLE automation

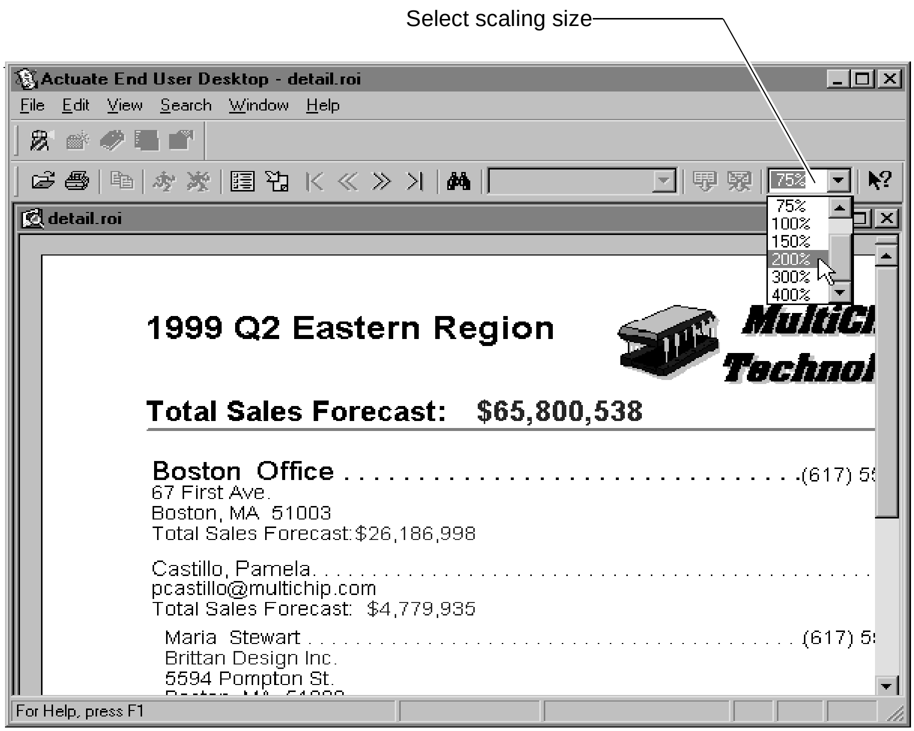
Report developers use OLE automation to make it possible for you to run another application from within an Actuate report. Typically, accessing the other application is transparent for the end user. For example, the developer can provide a button on a report that accesses Microsoft Excel and transfers data to the report.

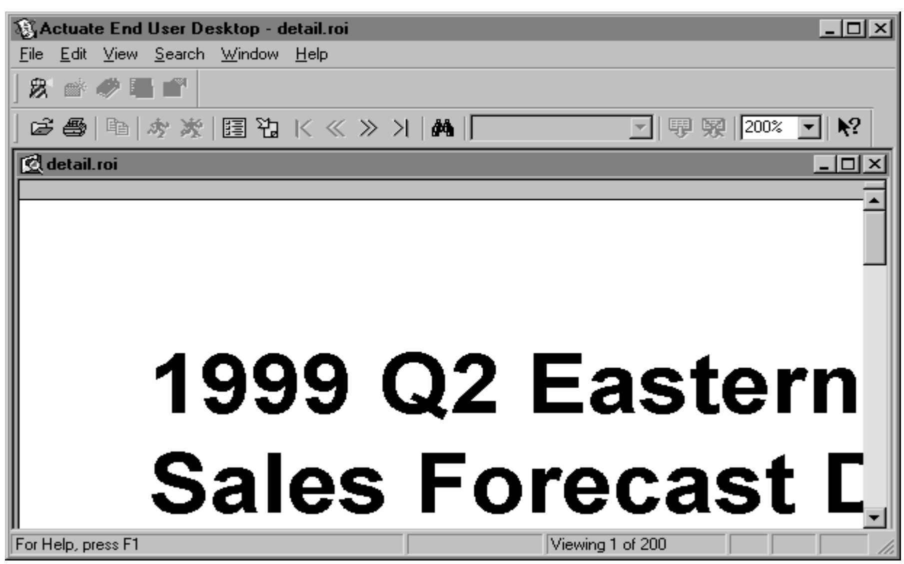
Zooming

Zooming in and out of a report makes it easier to view specific sections. The scaling range is from 25% to 400%. The following illustrations show a report at 50% and at 200%. The example shown is in the End User Desktop. If you are working in another product in the Actuate Reporting System, your menus and toolbars are somewhat different. However, the same capabilities exist.

Actuate uses the last zoom setting you set as the default magnification when opening report documents. When you open an Actuate report document .ROI by double-clicking its icon, dragging-and-dropping, or choosing File→Open, Actuate uses the default zoom. When you change the zoom scale of a report document, you change the default zoom setting.

When you click on a hyperlink in a report document that links to another report document, the linked document uses the zoom setting of the document containing the hyperlink.


Select scaling size
Actuate End User Desktop - detail.roi
File Edit View Search Window Help
75%
detail.roi
75%
100%
150%
200%
300%
400%
1999 Q2 Eastern Region
Total Sales Forecast: $65,800,538
Boston Office
67 First Ave.
Boston, MA 51003
Total Sales Forecast:$26,186,998
Castillo, Pamela
pcastillo@multichip.com
Total Sales Forecast: $4,779,935
Maria Stewart
Brittan Design Inc.
5594 Pompton St.
For Help, press F1


Actuate End User Desktop - detail.roi
File Edit View Search Window Help
200%
detail.roi
1999 Q2 Eastern
Sales Forecast D
For Help, press F1
Viewing 1 of 200

Using screen arrangement options

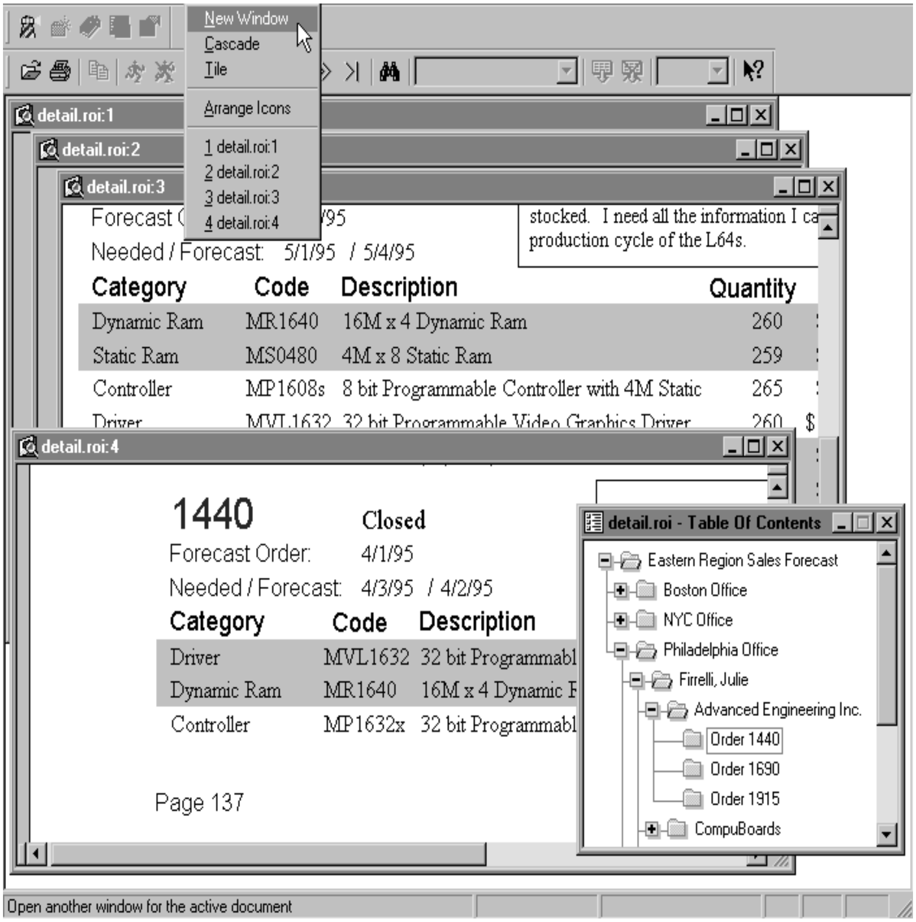
The Window menu provides the option to cascade or tile windows. The windows can contain different reports or different views of a single report.

Using New Window

New Window lets you add report windows. Use this feature if you need multiple views of the same report. Depending upon how you have used the Window menu options, the windows appear one on top of another until you use Cascade or Tile to arrange them.

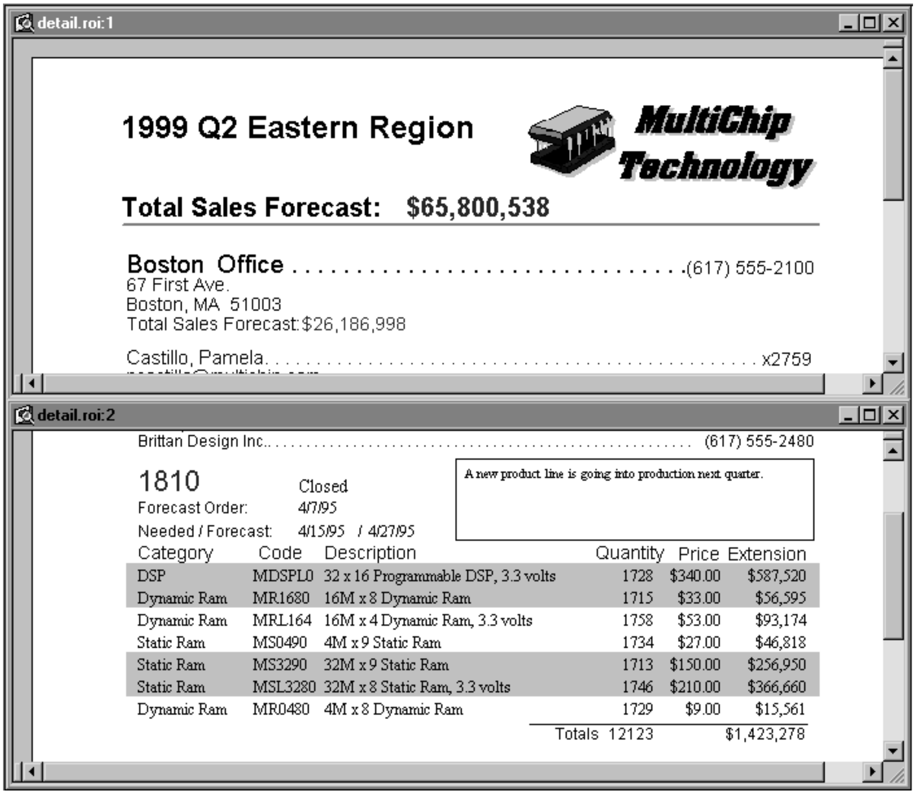
Using Cascade

The cascade commands cascades existing windows and any subsequent windows you open. In the following illustration, some windows are cascaded and some are not to permit comparison.



Using Tile

Select Tile to arrange file windows you have open. The first three windows tile horizontally. The fourth window divides the main window into four report windows. Subsequent windows continue to subdivide the screen. The following illustration shows two tiled windows.



Using online help in a sample report

During the design phase, report developers have the option to include report specific online help. For example, the report developer can add comments to give further detail about specific report objects or to explain how specific calculations were created.

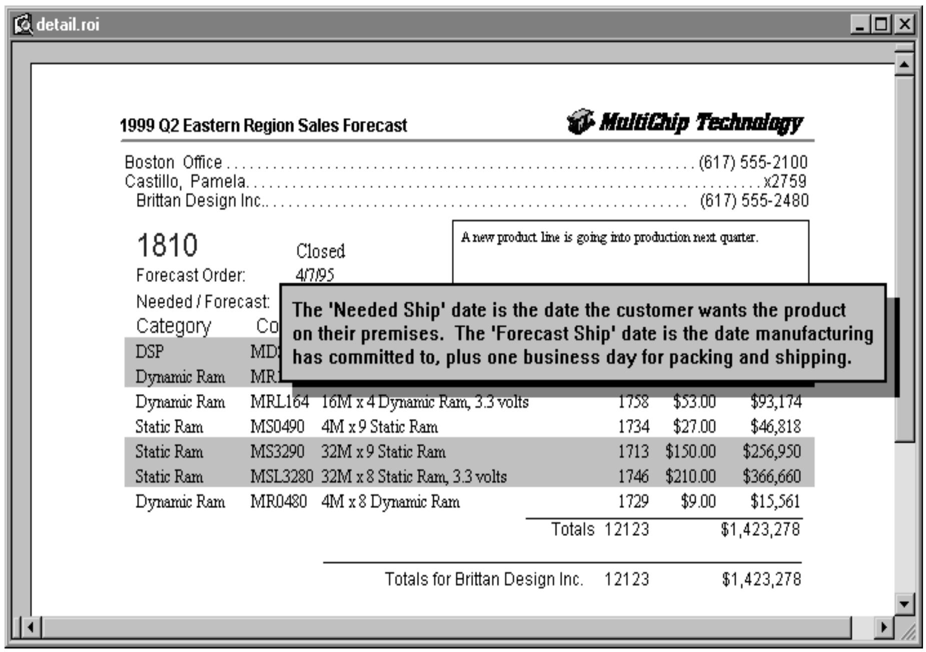
This section provides instructions for accessing online help specific to a report. The sample report, DETAIL.ROI, is used to demonstrate the procedure.

How to access report online help

1 Select the object in the report for which you want online information. In this example, select one of the dates, 4/15/95 or 4/27/95, on page 2 of DETAIL.ROI.

2 Press the right mouse button to access the context menu, which displays options provided by the report developer.

3 Select Help on that menu. The help item explains what the Needed/ Forecast heading on that column means.



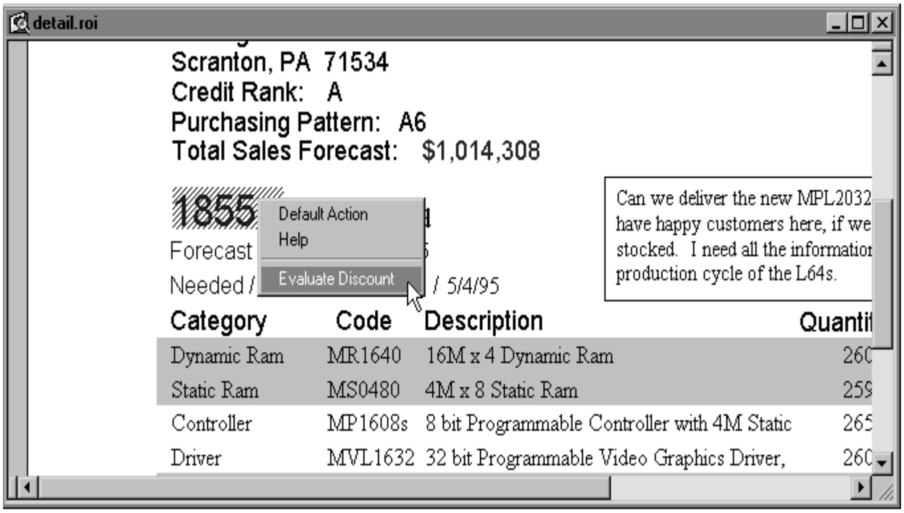
Another way to access the online help is to select the help icon. Then use the help icon to click on the object to see if the report developer provided help on that item.

If your cursor hovers over a control that has balloon help available, you see online help information provided by the developer.

Using context menus while you view a report

Context menus are an option the developer can choose to provide. If context menus have been provided by the developer, first select the object, then press the right mouse button to access the context menus. By default, Actuate reports provide the context menus “Default action” and “Help.” If, however, the report developer does not write code for these context menu items, they will not do anything.

The report developer can add other context menu items. For example, the following illustration shows a context menu that appears when you hold down the right mouse button over the number, 1855, in the sample report, DETAIL.ROI. Here the developer has chosen to provide the option “Evaluate Discount.”



It is important to remember that context menu actions are an option provided by the developer. Although you see them in the examples shown here, they are not available in every report.

Chapter

4

Running a report from the desktop

This chapter contains the following topics:

- Updating reports
- Running a report on your desktop
- Running a report in the Report Encyclopedia
- Creating report requests in the Report Encyclopedia
- About request-specific retry options
- About report request auto-archive rules
- Checking the status of report requests

Updating reports

Report developers typically create and distribute report documents, which other users can view and print. Sometimes developers distribute report executables that other users can run to generate reports with updated data. These reports can be run any time and as frequently as desired.

You can use the Developer Workbench, End User Desktop, Administrator Desktop, or LRX to run reports. You cannot run reports in the Viewer. Use the Viewer to view report documents that are already generated.

Using distributed reports

A report document contains objects that store both the report structure and data. When distributing a report, the report developer can bundle the report executable and the data with the file. Viewing that report does not require database access because the data is contained within the report.

Because these reports have no database access, you cannot run them to refresh the data. You can, however, use searching techniques to find and display selected data from the report. For more information about searching, see Chapter 5, "Searching for and exporting report data from the desktop."

About running reports

A report executable contains compiled Actuate Basic code that specifies how Actuate generates a report and what data it retrieves for the report. The advantage of running a report executable is that the resulting report contains the most current data.

When you run the report executable, Actuate draws from data sources originally selected by the report developer. Therefore, the report needs access to the same data source. The data source could be shipped with the report by the developer or, more likely, or the data source accessed on a server.

You can optionally bundle the report executable (.ROX) with the report document, if the report developer enables this option. You select the option to bundle the report executable in the Requester dialog when you run a report. For information about using the Requester, see "Specifying report parameters," later in this chapter.

Bundling the report executable creates a larger report document (.ROI), but allows you to move the report executable and report document as a single file. This makes sending reports to remote users and viewing reports on remote systems easier.

Creating HTML reports

If the report developer enables HTML report generation in the .ROX, the generation process creates an HTML report document viewable in a web browser.

Generating an HTML report on your desktop creates a subdirectory. The HTML files that make up the HTML report are in placed in the subdirectory. You can view the HTML report by opening the file INDEX.HTML in your web browser.

Generating an HTML report in the Report Encyclopedia creates an HTML report file (ROW). When you open this file, Actuate starts your default web browser and displays the HTML report in your browser.

Running open server reports

You cannot run open server reports locally. You can run open server from the Report Encyclopedia if you have the Advanced e.Reporting Server, and your administrator has configured the report server to run open server reports. For information about open server reports and importing open server reports, see Chapter 2, "Working with the desktop Navigator."

On Windows NT, the Actuate Sqribe report open server driver handles only Sqribe compiled, executable file type .SQT that are analogous to Actuate .ROX files. The Sqribe open server driver can generate the following output file types from a Sqribe .SQT report:

- Output file type .SPF proprietary Sqribe output (analogous to .ROI)
- Output file type .SQW web format output (analogous to .ROW). (not printable)
- Output file type .TXT A plain text file

Running a report on your desktop

Running a report that is stored on your local system provides different options and, therefore, involves different tasks from running a report in a Report Encyclopedia. When you run a report from your desktop, the report generates immediately. When you run a report in a Report Encyclopedia, you can schedule the time and day to generate the report. You can also specify if the report should be generated regularly. For information about running a report in a Report Encyclopedia, see "Running a report in the Report Encyclopedia," later in this chapter.

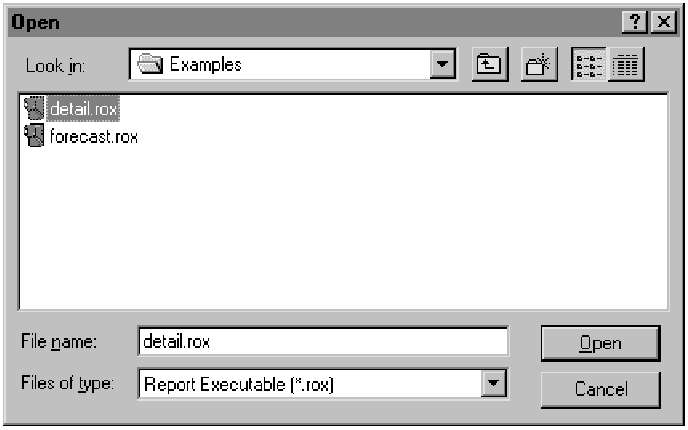
The default behavior is that running a report on your desktop creates a directory that contains an HTML report. The report developer can customize this behavior. For more information about HTML reports, see “Creating HTML reports,” earlier in this chapter.

How to run a report executable on your desktop

1 Choose File→Open.

The Open dialog box appears.

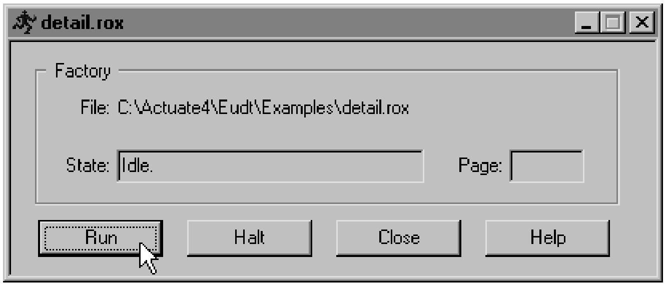
2 From the Files of Type list, choose Executables (*.ROX) to display only report executables in the Open dialog box.



3 Choose the executable you want to run.

The Factory window appears.

4 Choose Run to start the report generation process.



The Requester dialog box appears.

5 Choose OK to accept the default parameter values, or enter parameter values to narrow the range of data Actuate retrieves. For information about how to use the Requester, see “Specifying report parameters,” later in this chapter.

   The Factory begins generating the report.

6 To stop report generation at any time, choose Halt.

7 Choose Close after the report is finished running.

Monitoring report generation

The Factory window displays the status of the generation process and the number of the page being generated. The title bar displays the name of the report. The Viewer title bar displays “[In Progress]” while the report is being generated. When the Factory finishes generating the report, only the file name appears.

Viewing pages during report generation

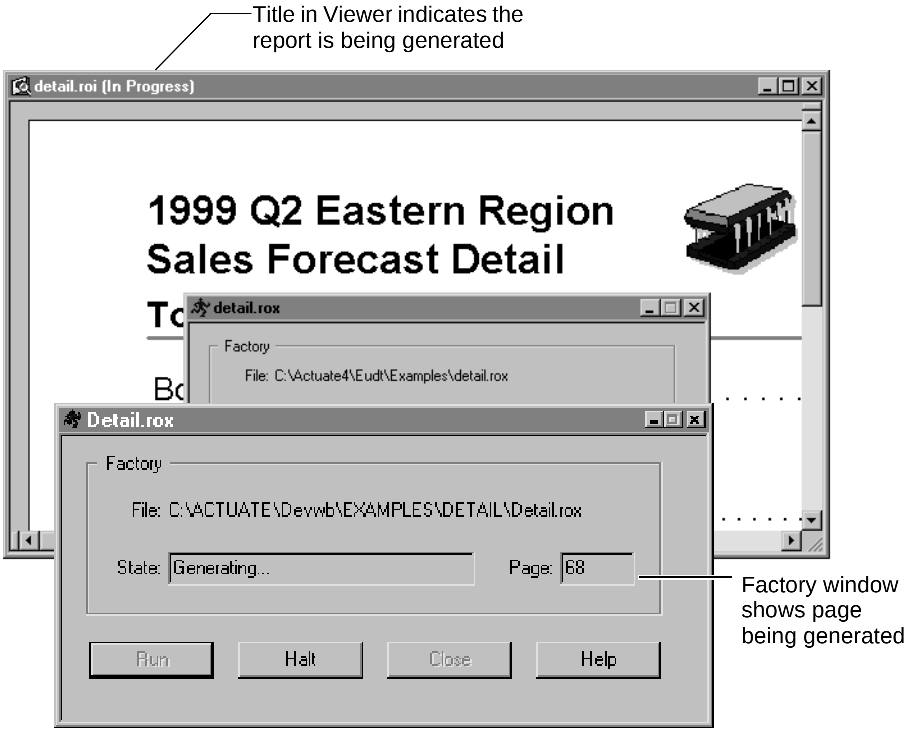
Typically, when you run a report object executable file, the Viewer starts automatically and displays the report as soon as the first page is generated. There is one exception. If you set the “Bundle Rox in Roi” output parameter in the Requester dialog box to True, the Viewer displays the report only when the Factory completes generating. For information about using parameters, see “Specifying report parameters,” later in this chapter.

As the report is being generated, you can use all the Viewer features except for the Table of Contents and Search features. These features are unavailable because they rely on all the data in a completed report.

Understanding checkpoints

As the Factory generates the pages of the report, it writes the completed pages to the report at designated checkpoints. The checkpoints occur after the completion of the 1st, 5th, 10th, 25th, and 50th pages, and every 50 pages after the 50th.

The Viewer displays the portions of the report that have been written to a file when you manually refresh the report. For information about refreshing the report, see “Refreshing the report in the Viewer,” later in this section.



Refreshing the report in the Viewer

To refresh a report in the Viewer as the Factory generates the report, choose any of the paging commands—First Page, Previous Page, Next Page, or Last Page—from the toolbar or the menu bar. Sometimes when you choose a paging command, the report in the Viewer is not immediately refreshed. The delay occurs when the Factory has not reached a new checkpoint since the last refresh. For example, if the last page of the displayed report is 50, the report is not refreshed until the Factory has finished processing the 100th page.

Use the Page information in the Factory window to refresh the report. For optimal results, choose a paging command immediately after a checkpoint.

Running a report in the Report Encyclopedia

To access a Report Encyclopedia, you should have a user name and password assigned by your system administrator. At the same time, the administrator should set up your access rights. If you have access to a Report Encyclopedia, you can run any report executable stored on that server for which you are granted read and execute privileges. To see what executables are available, use the Navigator to log on to the Report Encyclopedia and view the report files stored there. Since read and execute privileges are separate privileges in the Report Encyclopedia, you can have read privilege without execute privilege.

Running an executable on a server gives you more options than running it from your desktop. These options are collectively called a report request, described in the next section. If the report developer enables HTML report generation in the .ROX, when you run it you create an HTML report file (.ROW) in the Report Encyclopedia. For more information, see "Creating HTML reports," earlier in this chapter.

Creating report requests in the Report Encyclopedia

The following list summarizes the options you can set for a report request. For each option in this list, there is a corresponding section with detailed, step-by-step instructions:

- Specify parameter values to filter the data to retrieve, set formatting options, processing options, and so on, during report generation.
- Save the parameter values to a report parameter values file to reuse whenever you want to run the executable with the same values.
- Schedule the executable to run immediately, on a regular basis, or on selected dates.
- Distribute the completed report to a folder in the Report Encyclopedia and set privileges.
- Request that the server send notification messages, including e-mail notification, to selected users or user groups when the report is completed.
- Request that the server print the report when it is completed.

You can schedule requests within the range January 1, 1980 through December 31, 2036, inclusive.

Running open server reports

If you have the Advanced e.Reporting Server, the Actuate open server report functionality extends the Actuate Reporting System to handle report executables and report documents from third-party vendors called open server reports. The open server feature that lets you run or print third-party reports is available only from the Report Encyclopedia. You cannot run open server reports locally. For information about open server reports and importing open server reports, see Chapter 2, "Working with the desktop Navigator."

Creating open server report generation requests

After you define the open server file type and set up the report parameters for the open server report, you can create a report generation request from Actuate desktop software using the standard Actuate Report Encyclopedia request dialog from an or from a browser using the Web report request form. For information about using the Web form see “About report generation and the Web,” in Chapter 1, “Using e.reports on the Web.”

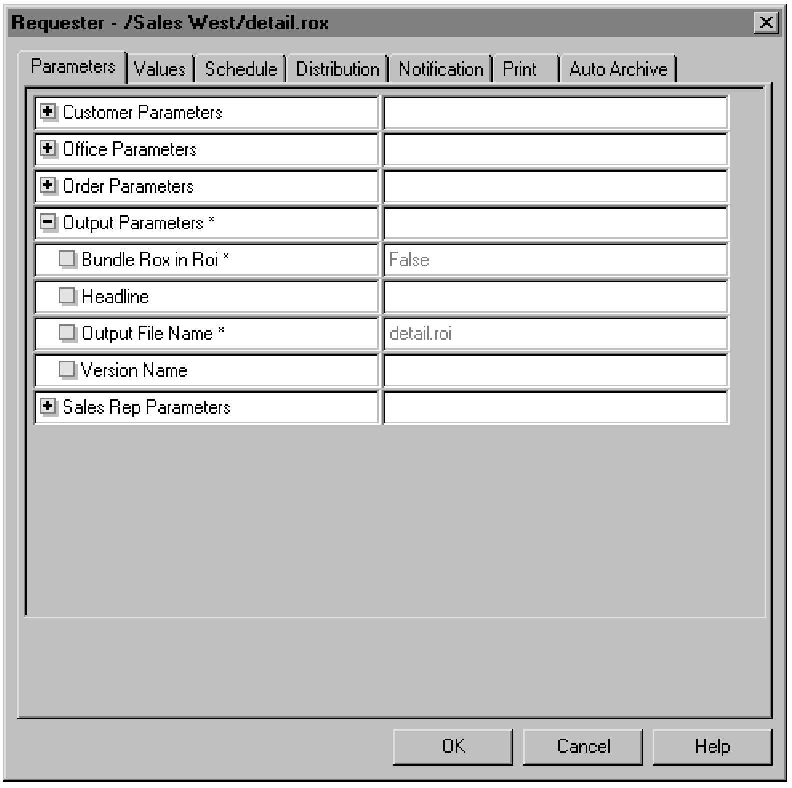
How to start a new report request

1 Locate and select the report executable in the Report Encyclopedia.

2 Press the right mouse button to display the context menu associated with the executable.

3 Choose New Request.

The Requester dialog box appears. It contains six tabs, each corresponding to options you can specify with the report request. The following illustration shows a sample Requester dialog box.



Specifying report parameters

Parameters provide criteria when a report is run. These parameters, defined by the report developer in the report design, can control aspects of report generation such as:

- Records retrieved
- Sort sequence of data
- Output format

If you do not specify any parameter values, Actuate uses the default values defined by the report developer.

Entering parameter values

The way you enter parameter values depends on whether the report developer used Actuate's default interface or built a custom dialog box for gathering parameter values. If the developer used the default interface, you enter parameter values next to the parameter names. The previous illustration shows an example of the default parameters page.

Using a custom Requester dialog box

If the report developer created a custom dialog box for gathering parameter values, an Edit Parameters button appears at the bottom of the Parameters page. Choose this button to launch the custom dialog box in which you enter and edit parameter values. The Parameters page displays the values as read only.

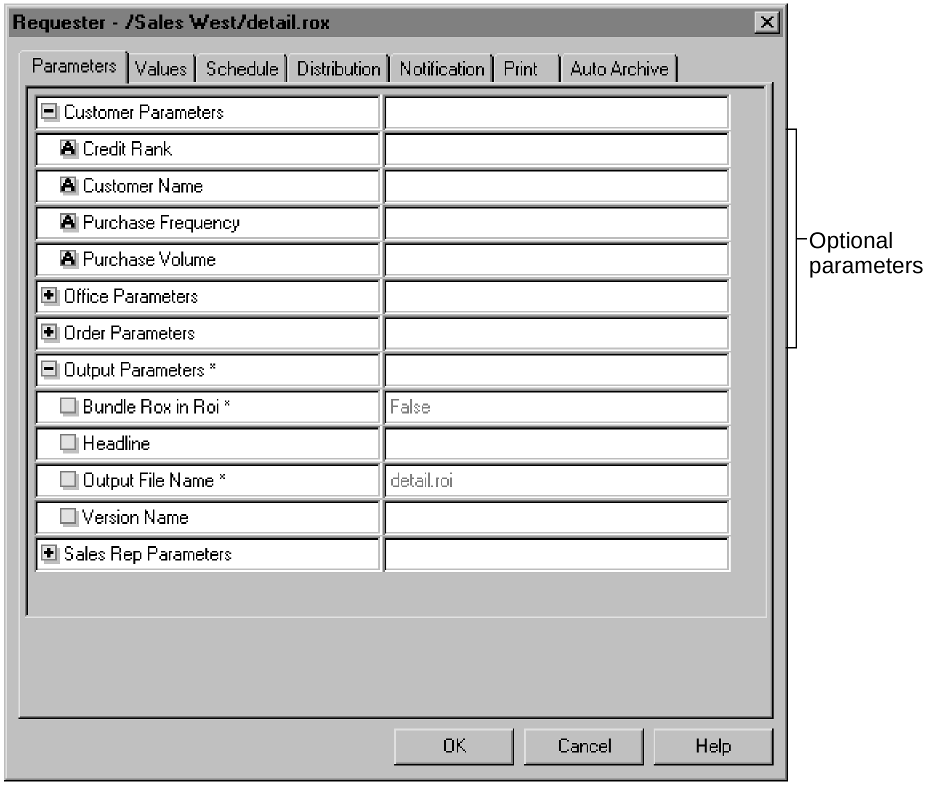
Understanding parameter types

There are three types of parameters:

- Optional
- Required
- Ad hoc

Optional parameters

Optional parameters do not require that values be entered. Most report parameters are optional. They are a convenient way for users to narrow the scope of the report, if desired. If you do not specify any values, default settings are used. Optional parameters appear in the parameter list without a trailing asterisk, as the following illustration shows.

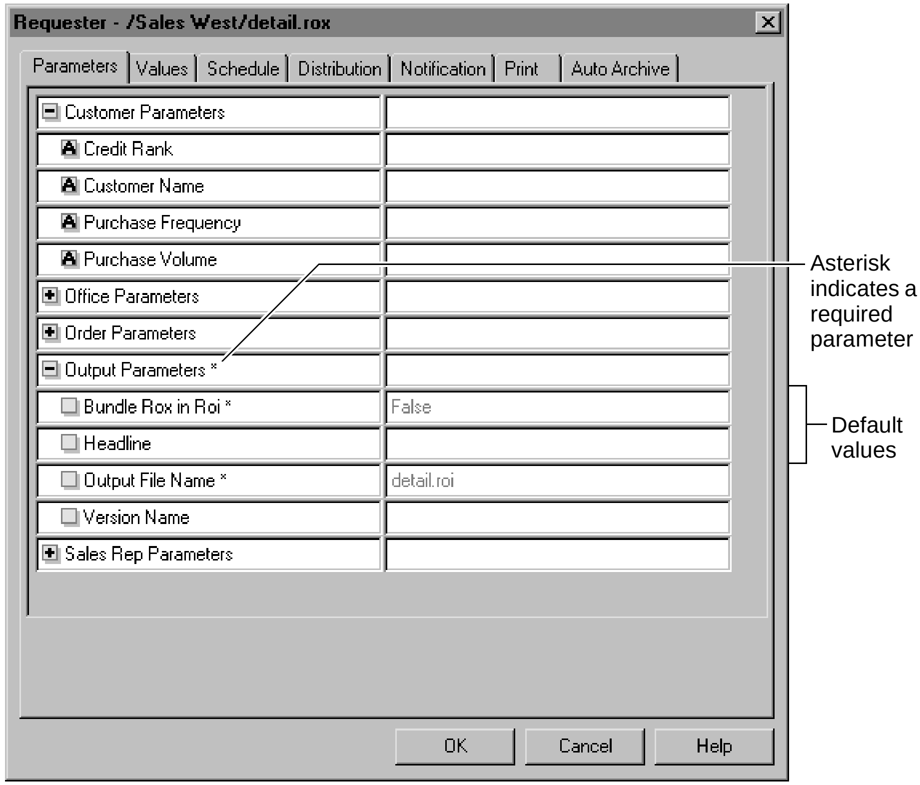


Required parameters

Certain parameters must have a value supplied in order for the report to run. For instance, accessing a database requires a user name and password. The Requester indicates a parameter is required by providing an asterisk after the parameter name.

A required parameter typically has a default value supplied by the developer. Those default values appear in the Requester as gray text. In the following example, both output parameters are required, but default values have been supplied so that the report runs.

If you change the Output File Name parameter from the default, this output file name overrides the output name specified in the Distribution tab.



Ad hoc parameters

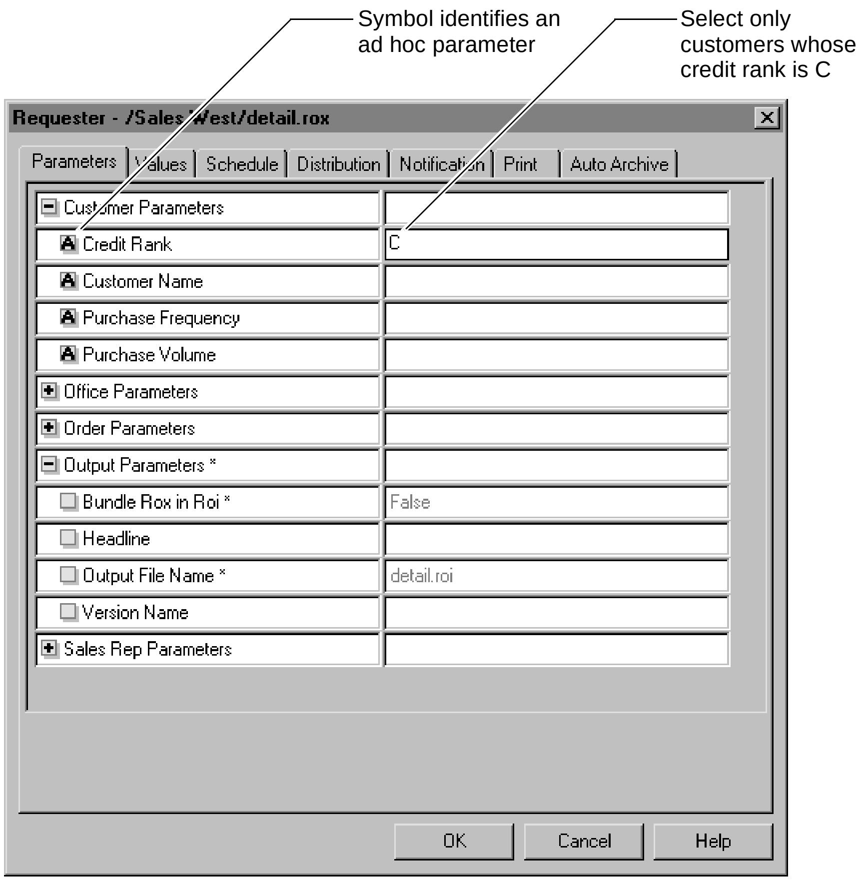
Ad hoc parameters narrow the scope of the data retrieved by a SQL query. A report developer designs a SQL query to retrieve data from a database. By entering values for ad hoc parameters in the Requester, you modify the WHERE clause of the SQL statement to retrieve data that meet certain criteria.

An ad hoc parameter is indicated in the Requester by a small A next to the parameter name. Ad hoc parameters can be either optional or required.

Specifying a single value for an ad hoc parameter

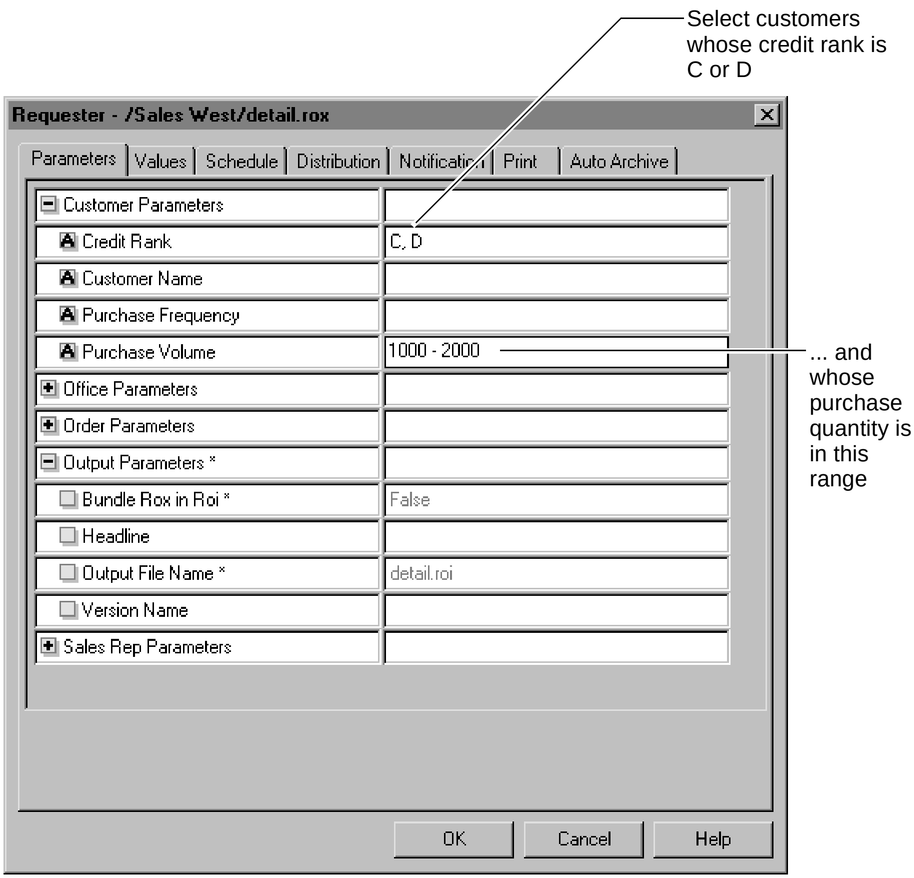
Typically, you supply a single value for ad hoc parameters. When you change that value, the data retrieved will change. In the following illustration, the ad hoc parameter value “C“ results in a sales detail report that lists all customers with a credit ranking of “C”. In SQL terms, setting the parameter to “C” narrows the selection of customer data with the clause:

```
WHERE customers.creditrank LIKE 'C%'
```



Specifying a QBE conditional expression for an ad hoc parameter

You can use a QBE conditional expression instead of a single value. The conditional expression can include items such as lists and ranges. For example, you can set the credit rank parameter to C, D and the purchase volume parameter to 1000-2000, as the following illustration shows.



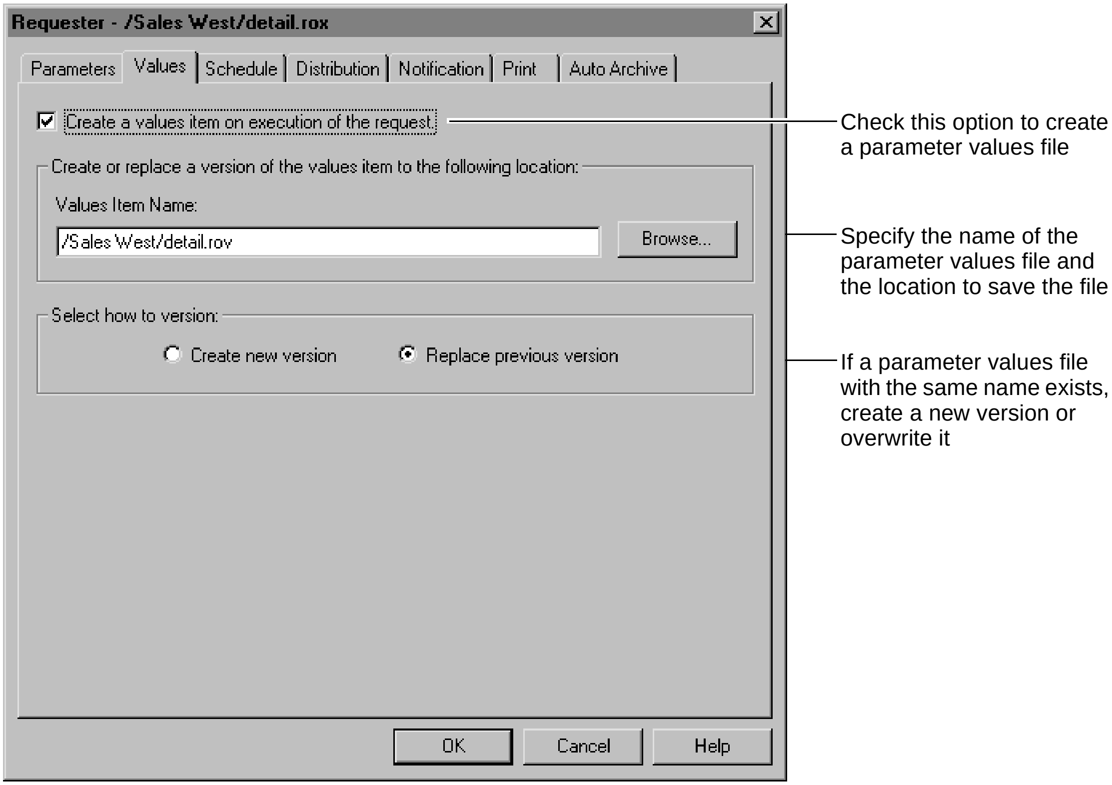
Actuate adds the following clause to the SQL query:

```
WHERE (customers.creditrank LIKE 'C%' OR customer.creditrank LIKE 'D%')
AND customers.purchasevolume BETWEEN '1000%' and '2000%'
```

Saving parameter values

After you set the parameter values in the Parameters page of the Requester dialog box, you can save them to a report parameter values (.ROV) file to reuse whenever you want to run the report executable with the same values. To do so, modify the settings in the Values page of the Requester.

By default, Actuate writes the parameter values to a file and stores that file in a temporary folder. When the report is generated, Actuate deletes the temporary parameter values file.



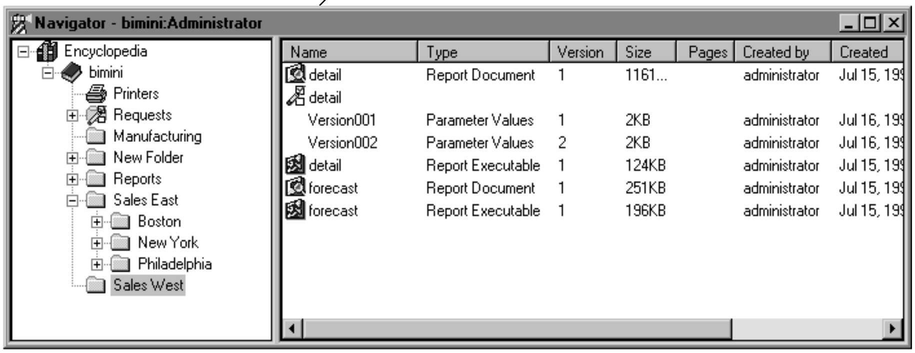
Maintaining versions of the parameter values file

When you save parameter values to a file, you can choose to create a new parameter values file or replace a previous version. The first option is useful for creating different parameter values files for different sets of parameter values. For example, if you regularly generate two sales reports from a single report executable—one that reports sales in Boston, and the other, sales in New York—create a parameter values file for each report.

If you save different versions of the parameters file, successive files created from the same executable are saved with the same name with incrementing version names. With this autoversioning capability, you can maintain a chronologically ordered set of versions of the same report items.

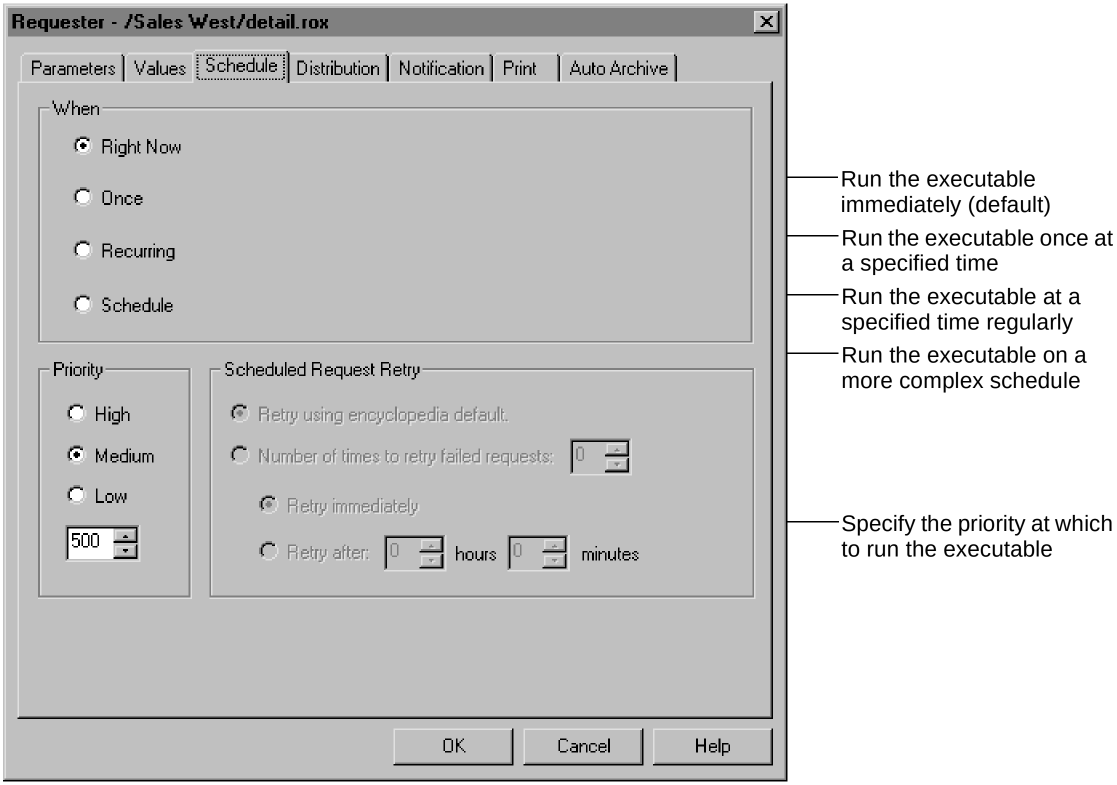
The following illustration shows how the Report Encyclopedia maintains different versions of report items.

Two versions of report documents were generated from two parameter values files associated with a single executable



Scheduling the time to run the executable

Use the Schedule tab in the Requester to schedule when a report request should be run. You can schedule the executable to run immediately, once at a specified time, on a recurring basis, or on any specified schedule. If you do not specify a schedule, Actuate runs the executable immediately.

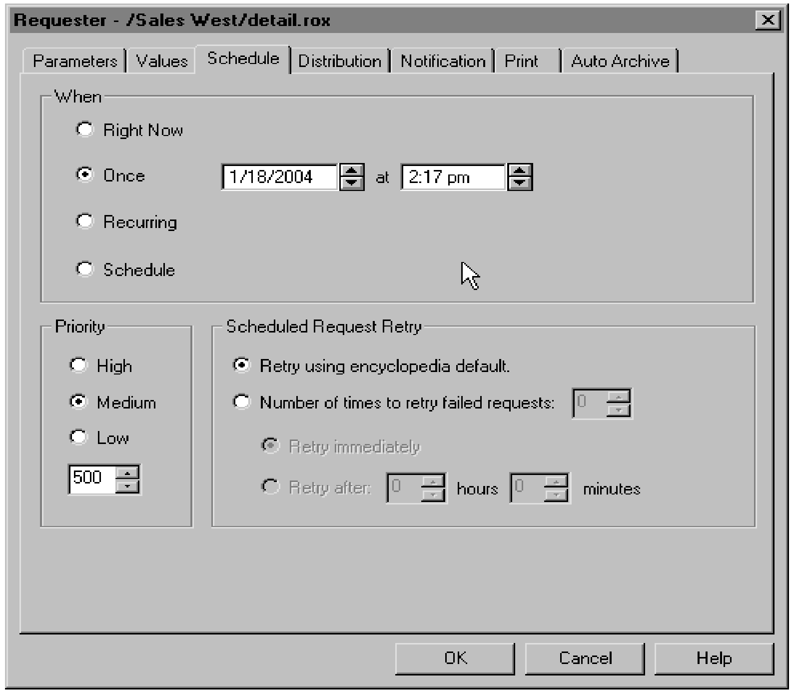


The following are three examples of report scheduling:

- Scheduling a report to run once
- Scheduling a report to run daily for a specified week
- Scheduling a report to run on a specified weekday for a specified period, excluding holidays

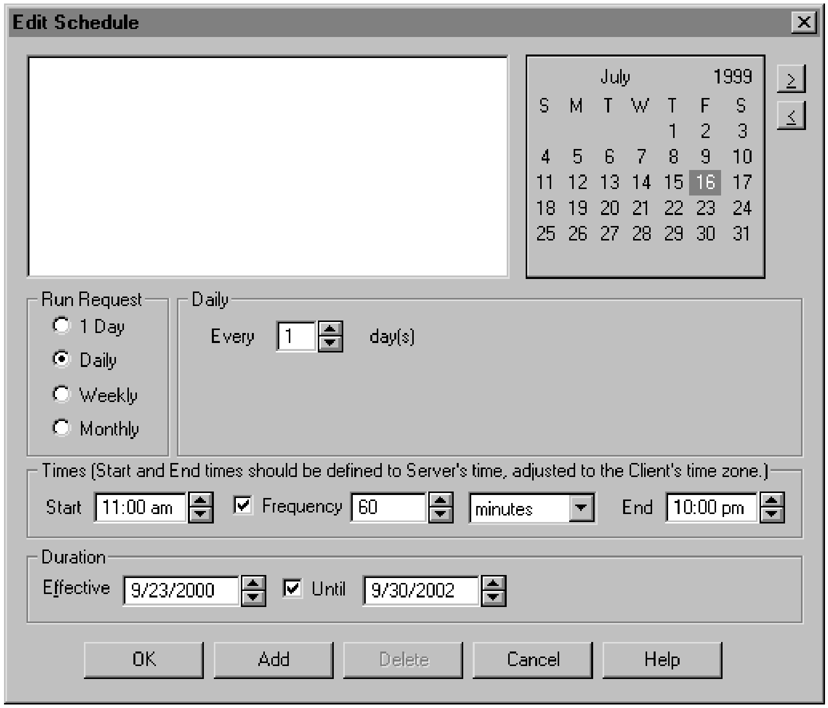
Scheduling a report to run once

Suppose you want a report on this week's new accounts after close-of-business Friday. To set this schedule, choose Once, then enter the settings as shown in the following illustration.



Scheduling a report to run daily for a specified week

Suppose you want an hourly report on new account activity every day during the last week of September at a sales conference. The first report is run at 11:00 am, and the last, at 10:00 pm. To set this schedule, select Schedule, then choose the Edit Schedule button. Enter the settings as shown in the following illustration.

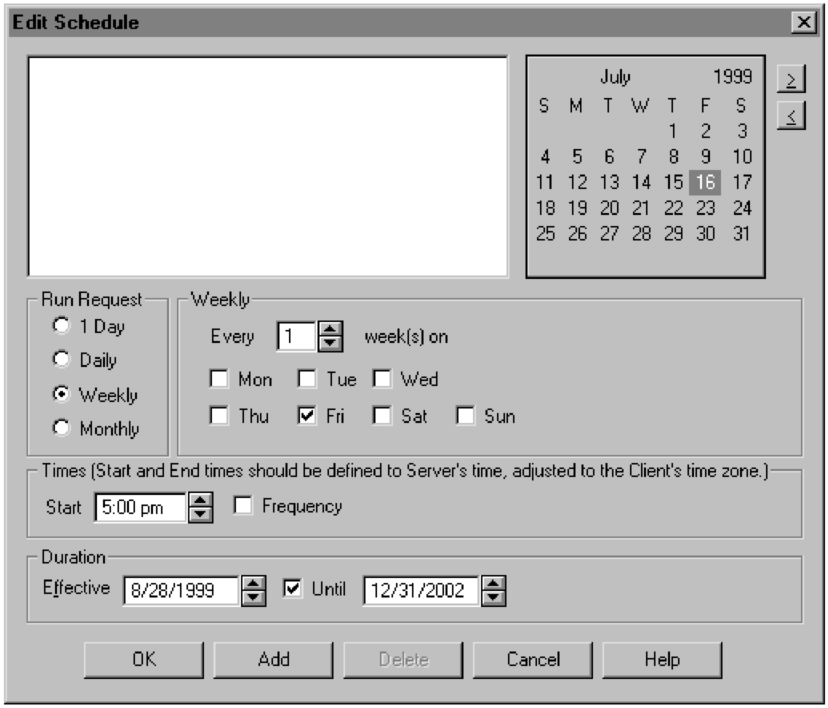


Scheduling a report to run on a specified weekday for a specified period, excluding holidays

You want a weekly report that is generated once every Friday during the fourth quarter, except on holidays. To set this schedule, you would set up a weekly run for the specified duration, then exclude the Fridays that are holidays. In this example, November 29 falls on a Friday and is a company holiday, so you need to exclude this day from the schedule.

To set the schedule, use the following steps:

1. Choose Schedule, then choose the Edit Schedule button.
2. Enter the settings as shown in the following illustration.



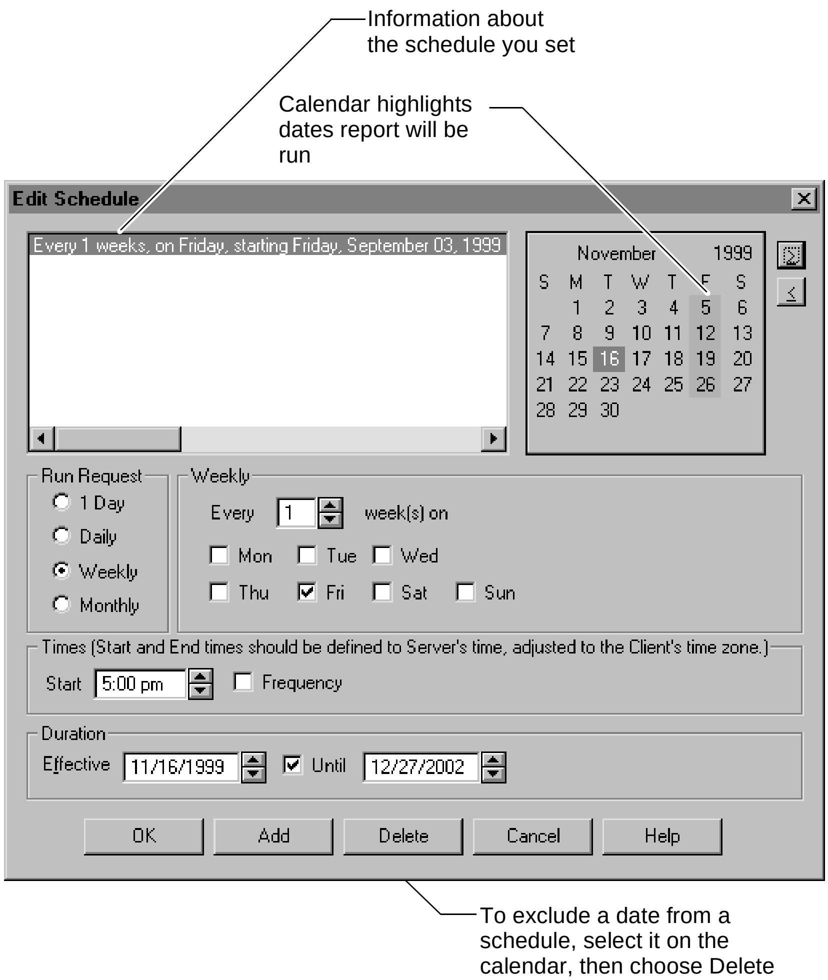
3 Choose Add to save the schedule information.

The text box displays the schedule information you set, that is, how often the report runs, the start and end dates and times. The calendar on the right displays the selected dates in a highlighted color.

Now that you have finished setting up the recurring schedule, you can exclude November 26 from it.

To exclude this day from the schedule, do the following:

1 Click the right arrow button next to the calendar until November is displayed. The following illustration shows the schedule information for the month of November.



2 Select November 26 on the calendar, then choose Delete.

The date is excluded from the schedule. It is no longer highlighted in the calendar, and the information in the text box contains an additional clause "except 11/26/1999."

Creating complex schedules

The previous second and third scheduling examples are just two examples of how you can use the Edit Schedule dialog box to create complex schedules.

You can create even more complex schedules by adding more conditions. For example, you can select a date from the calendar, select the 1 Day option, then specify time and frequency values for a run request on that particular day. The text box of the Edit Schedule dialog box reflects your choices, so you can always keep track of the scheduling conditions.

Setting the priority at which to run the executable

Reports can be run at three priority levels, high, medium, or low. These priorities represent the order in which reports are run if there are many requests in the queue.

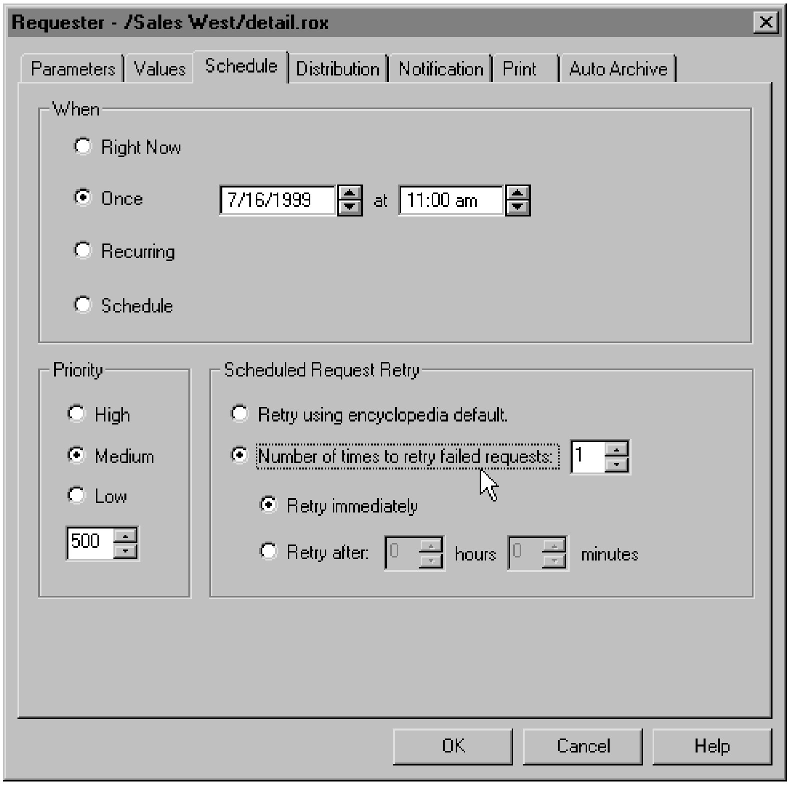
The priority levels you can specify depend on what the administrator assigned as the maximum priority you can set for requests. If, for example, the administrator set your maximum request priority at medium, you can run reports only at the medium and low priorities.

About request-specific retry options

Users who can generate report requests can override Report Encyclopedia request retry defaults for scheduled requests.

When you create a report request, you can override the Report Encyclopedia defaults by changing the settings from the Requester dialog box Schedule tab.

In the Schedule tab, under Scheduled Request Retry, select Number of times to retry failed requests, and enter the number of attempts and the interval between retry attempts. The Scheduled Request Retry settings are active only when you create a scheduled request. The settings are inactive when you select the Right Now option.



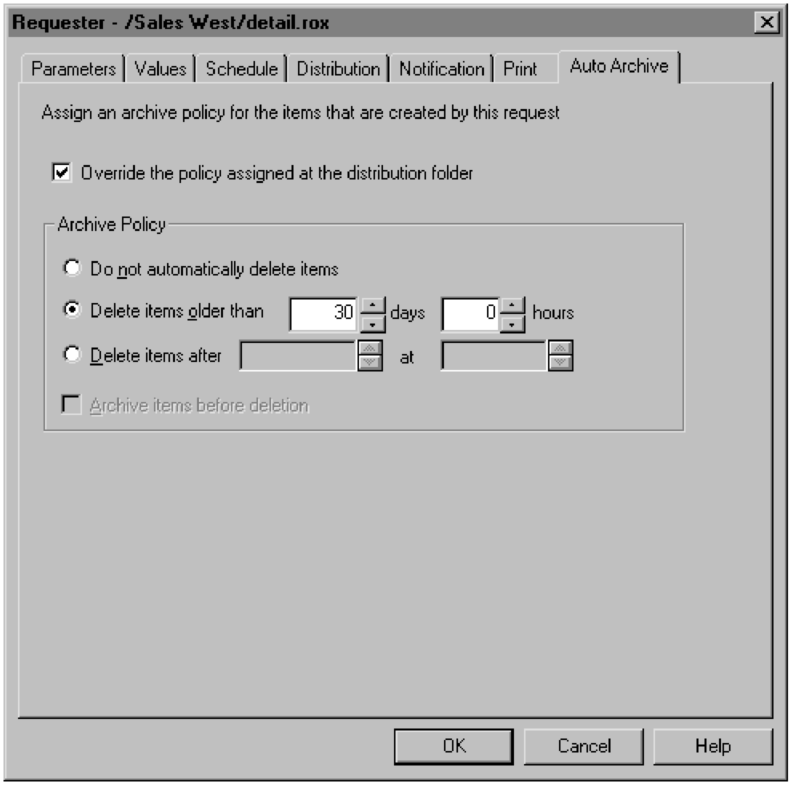
About report request auto-archive rules

You can set auto-archive rules for generated files such as Actuate report documents, or third party reports generated using the Actuate open server. These settings override Report Encyclopedia settings. The archive tool specified in the Encyclopedia settings is the tool used to archive Encyclopedia objects.

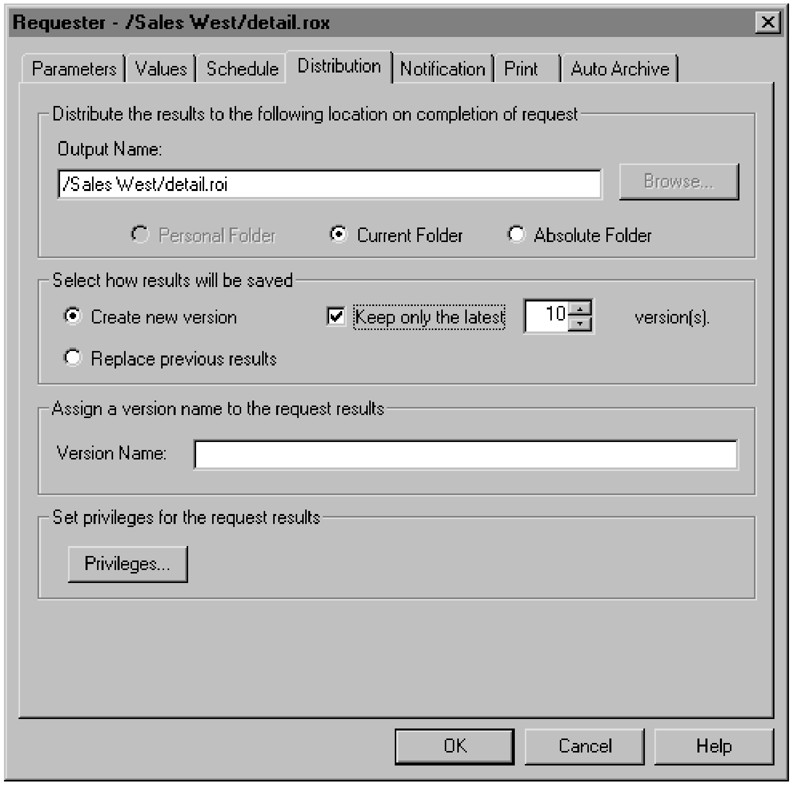
Setting report request auto-archive rules

Users generating a report request set auto-archive rules from the Requester dialog box Auto Archive tab and Distribution tab.

From the Auto Archive tab, set the date or auto-archive rule. If archiving is available, you can select to archive files before they are deleted based on the auto-archive rule.



From the Requester dialog box Distribution tab, you can limit the number of versions of the report kept in the Report Encyclopedia. The default is not to remove any versions of the report. If you select Keep only the latest, the default number of version to keep is 10.

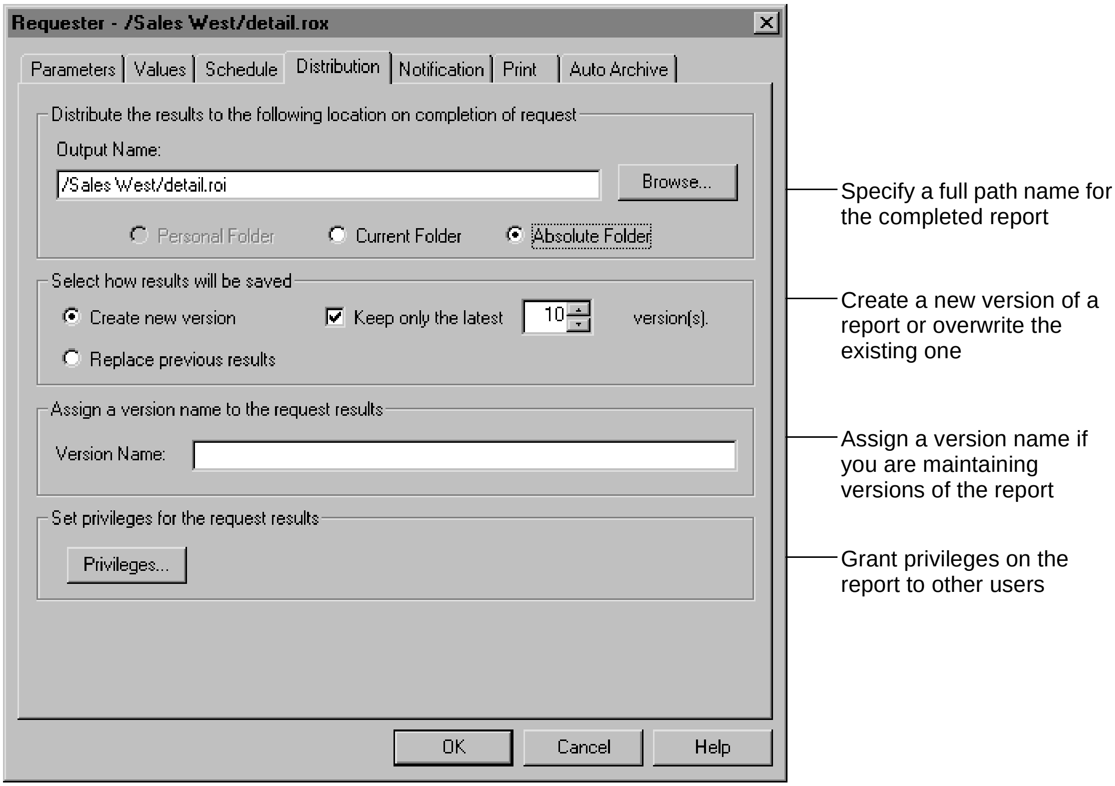


Distributing a report

Use the Distribution tab in the Requester to specify where and how to distribute reports produced in the Report Encyclopedia. You can specify the following:

- A different name for the report. By default, Actuate uses the same root name as the executable used to generate the report. Changing the default report name in the Parameters tab overrides the name specified in this tab.
- A folder in the Report Encyclopedia in which to place the report. By default Actuate stores the report in the personal folder of the user generating the request. If the user does not have a personal folder, the report is stored in the folder where the executable resides. To override the default, choose Current Folder to store the report where the executable resides or choose Absolute Folder and specify the new directory and name for the report.
- Whether the report should be a new version or should replace existing reports with the same name. By default, a new version is created.

- A version name for the report. By default, a version number is used, for example, Version 1 or Version 2.
- Read, write, delete, execute, and grant privileges to different users and roles. If you do not assign privileges, users have the default privileges specified in your privilege template. For information about privileges, see “About Report Encyclopedia folder and file privileges” in Chapter 2, “Working with the desktop Navigator.”



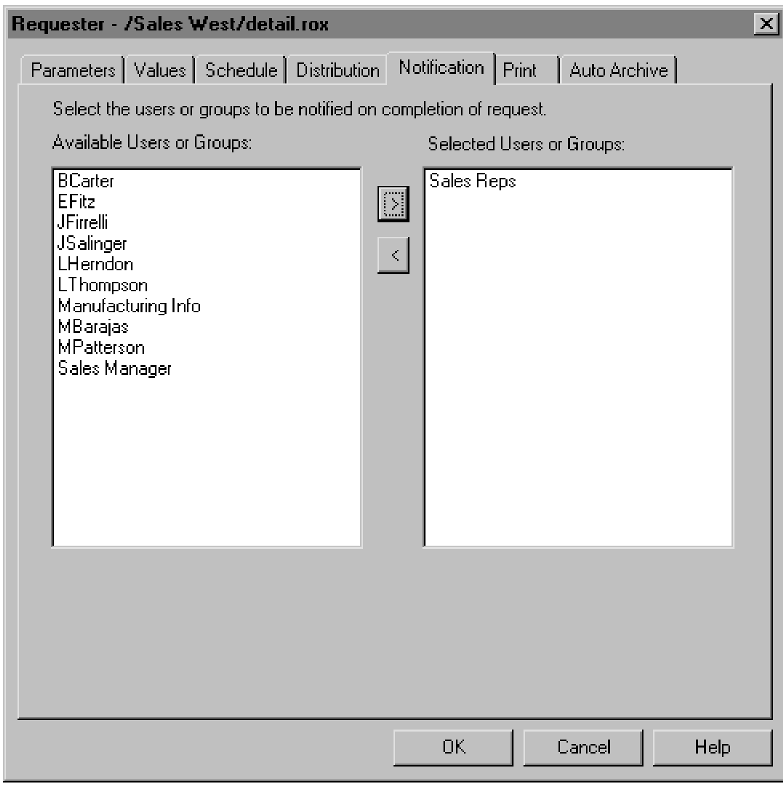
Using report versions

If you choose to save version results, successive report instances created from the same report request will all be saved under the same name with incrementing version names. Versioning keeps a chronologically ordered set of versions of the same report. If you choose to replace previous results, all previous versions of the report are deleted.

Setting notification options

Use the Notification page in the Requester to choose users and groups to be notified when the report is completed. By default, only you and the administrator are notified when the report is generated.

The left pane of the Notification page displays the available users and groups for the Report Encyclopedia. Users and groups are set up by the report server administrator. Ask the administrator to set up a group that contains users to whom you regularly send a particular report.



Select users or groups to notify by selecting names from the left and moving them to the right

Types of notification

There are two types of notification:

- Report server notification
- E-mail notification

The type of notification a user gets depends on the user's notification preference. Users can change their notification preference from the users Properties dialog box. For more information about setting user properties, see "Changing user properties" in Chapter 2, "Working with the desktop Navigator."

Report server notification

When report server notification is in effect, reports appear in the Completed folder as soon as they are generated. Actuate uses the report server notification when the user's notification preference is set to Completed folder notice.

E-mail notification

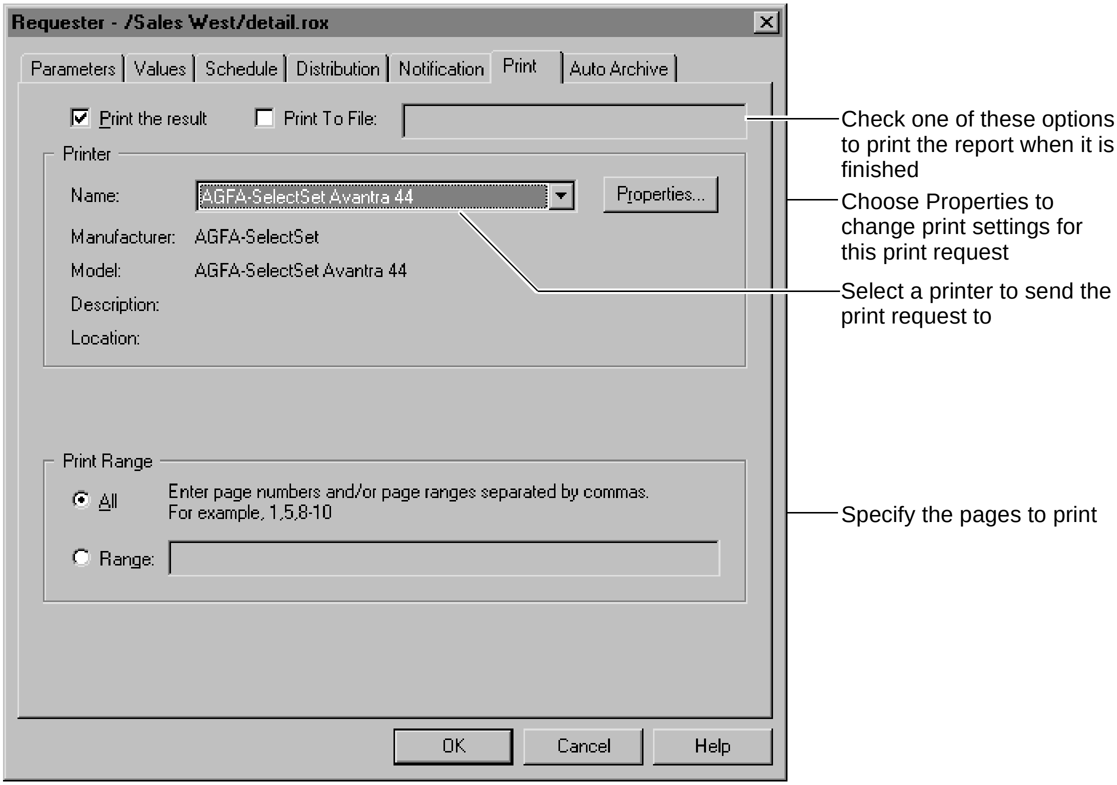
Users receive e-mail notification of a completed report if their notification preference is set to Email notice.

Setting report request printing options

Use the Print tab in the Requester to specify where and how to print the completed report. By default, Actuate does not print the report.

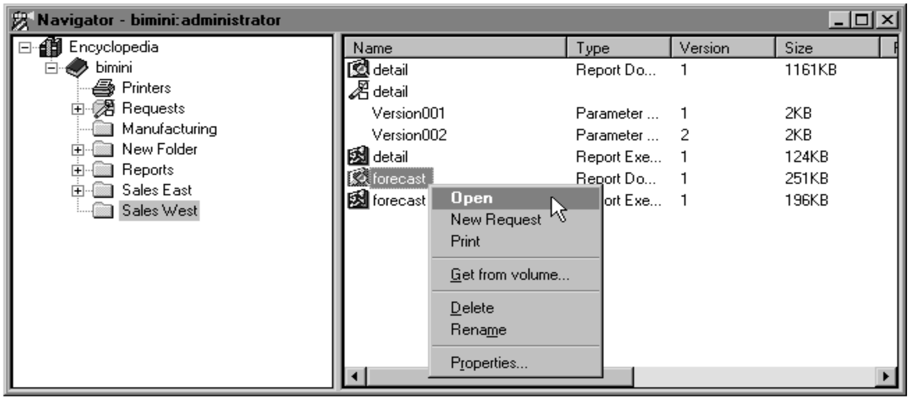
You can specify the following printing options:

- The file name if Print to file is selected.
- The network printer to use to print the report.
- Printer properties, such as paper size, paper orientation, duplex, number of copies, and so on. By default, the printer uses the default properties you set for the selected printer. If you did not set default properties for the printer, the printer uses the system-level defaults set by the system administrator. For more information about setting printer properties, see "Setting printer properties in the Report Encyclopedia" in Chapter 6, "Printing and distributing a report from the desktop."
- The pages to print. You can print a single page, a range of pages, or all the pages.



Viewing a completed report

After you receive notification of a report request completion, you can view the report from its notification in the Completed folder, or directly from the report document in the destination folder you specified when you created the request. To view the report, select View Report from its context menu.

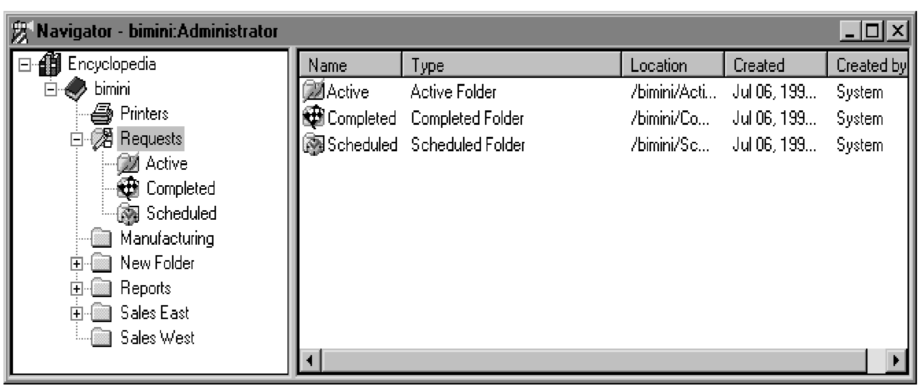


For information about interactive viewing features, see Chapter 3, "Viewing a report from the desktop."

Checking the status of report requests

The Report Encyclopedia stores status information about report requests in the Requests folder. You can view this information at any time by opening the Requests folder and the folders it contains.

If you are using the Actuate Viewer, you see only the Completed folder that contains requests that have been processed. If you are using Actuate desktop software other than the Actuate Viewer, for example, the Actuate End User Desktop, you can see scheduled and active requests.



How the report server manages report requests

Report requests can be in one of three states, in the following order, scheduled, active, or completed. Corresponding to each state is a folder. As a report request progresses from one state to the next, it moves to the corresponding folder.

A request appears in the Scheduled folder once it has been submitted. That request moves to the Active folder when it is time for the report to be run. Once the request has been processed, the request moves to the Completed folder, where it remains until you delete it.

For example, if you scheduled a report to be run at 12:00 am on August 15, 1996, the request appears in the Scheduled folder until 12:00 am on August 15, 1996, at which time the request moves to the Active folder. The request stays in the Active folder until the Factory finishes processing it, at which time the request moves to the Completed folder.

A report is not always run at the scheduled time. The time it is actually run depends on several factors, for example, the priority level of a request, the availability of Factory processes, the number of requests in the queue, and so on. You can specify the priority of your request, but only the administrator can control the number and schedules of concurrent Factory processes.

Checking the Requests subfolders

Checking the contents of the Scheduled, Active, and Completed folders tells you the status of requests you scheduled. Requests scheduled by other users are not visible to you, just as your requests are not visible to others. The Completed folder contains requests you submitted and requests that other users submitted and notified you about. Only the administrator can monitor all requests managed by the report server.

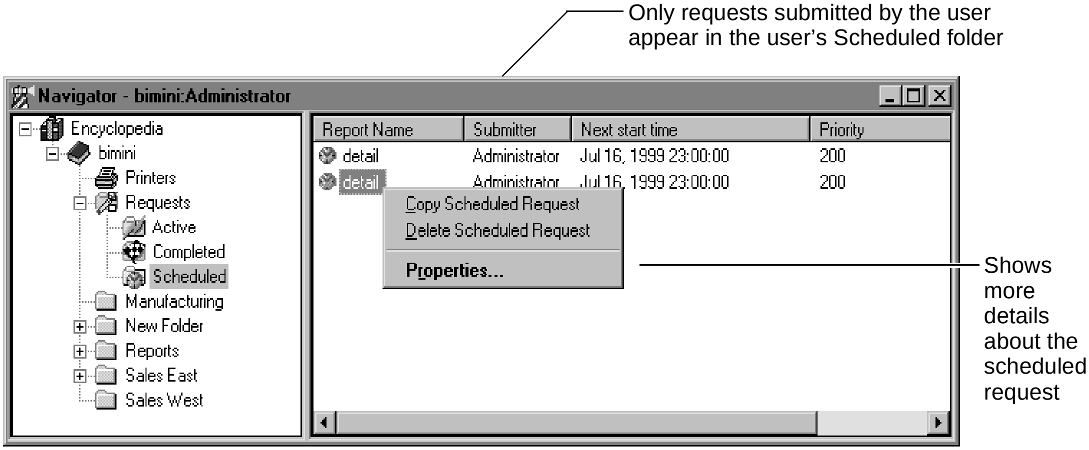
Contents in the Scheduled folder

The Scheduled folder contains the requests you scheduled to run at a later date and time. This folder is not visible when you use the Actuate Viewer.

You can view the following information about the scheduled request in the right pane of the Navigator window:

- Name of the report executable to be run.
- User who submitted the request.
- Date and time the report executable is to be run.
- The priority of the request. By default, the priority levels are indicated as follows: 200 = low, 500 = medium, 800 = high.

  The following illustration shows the contents in a user's Scheduled folder, and the context menu associated with scheduled requests.



Getting more details about a scheduled request

To get more details about a request in the Scheduled folder, right-click the scheduled request icon or the name of the job, then choose Properties from the context menu. The Properties dialog box that appears displays the information you specified when you created the request, the parameter values used to run the report, the schedule, distribution, notification, and printing information.

Editing a scheduled request

You can edit a request in the Scheduled folder at any time. You can change the parameter values, schedule, distribution, notification, and print options. To do so, right-click the scheduled request icon or the name of the job, and choose Properties from the context menu. Then edit the information in the Properties dialog box that appears.

Printing scheduled request information

You can print scheduled request information from the Summary tab of the scheduled request Properties dialog box.

Deleting requests in the Scheduled folder

You can delete requests any time before the request is processed. To do so, right-click the scheduled request icon or the name of the job, then choose Delete Scheduled Request. You cannot recover a deleted request.

After a scheduled request is completed, the request remains in the scheduled requests folder for at least 24 hours. After 24 hours, the scheduled request remains in the folder until all the completed notices related to the scheduled request are removed from the completed requests folder.

Contents in the Active folder

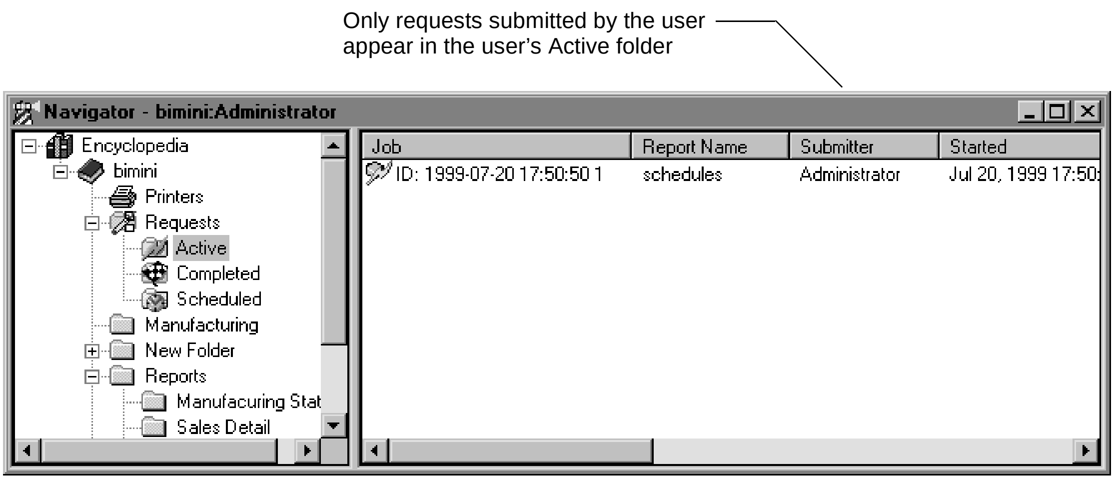
The Active folder contains the requests that are ready to be processed or are currently being processed. This folder is not visible when you use the Actuate Viewer.

You can update the information in the Active folder by using the Active folder's context menu. Right-click the Active folder and select Refresh.

You can view the following information about the active request in the right pane of the Navigator window:

- Job name as maintained by the report server. This name is a combination of the date and time of the scheduled run and the file version name.
- Name of the report executable that is ready for processing or is currently being processed.
- User who submitted the request.
- Date and time the generation process was started, if it has started.
- Priority of the request. By default, the priority levels are indicated as follows: 200 = low, 500 = medium, 800 = high.
- Name of the generated report.
- Name of the Factory process used to generate the report.

The following illustration shows the contents in a user's Active folder.



Getting more details about an active request

To get more details about a request in the Active folder, right-click the active request icon or the name of the job, then choose Properties from the context menu. The Properties dialog box that appears displays additional general information about the request.

Printing active request information

You can print active request information from the Summary tab of the active request Properties dialog box.

Deleting requests in the Active folder

You can delete requests while they are in the queue. To do so, right-click the active request icon or the name of the job, then choose Delete Active Request. You cannot recover a deleted request.

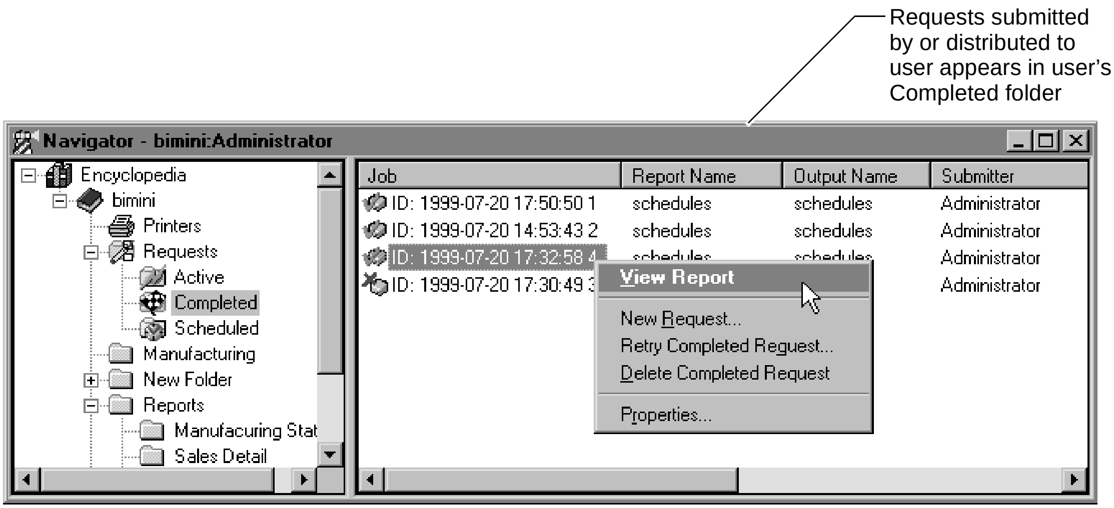
Contents in the Completed folder

The Completed folder contains the requests that have been processed. You can view the following information about the completed request in the right pane of the Navigator window:

- Job name as maintained by the report server. This name is a combination of the date and time of the scheduled run and the file version name.
- Name of the report executable that was run.

- Name of the generated report.
- User who submitted the request.
- Date and time the report was completed.
- Number of pages in the report.

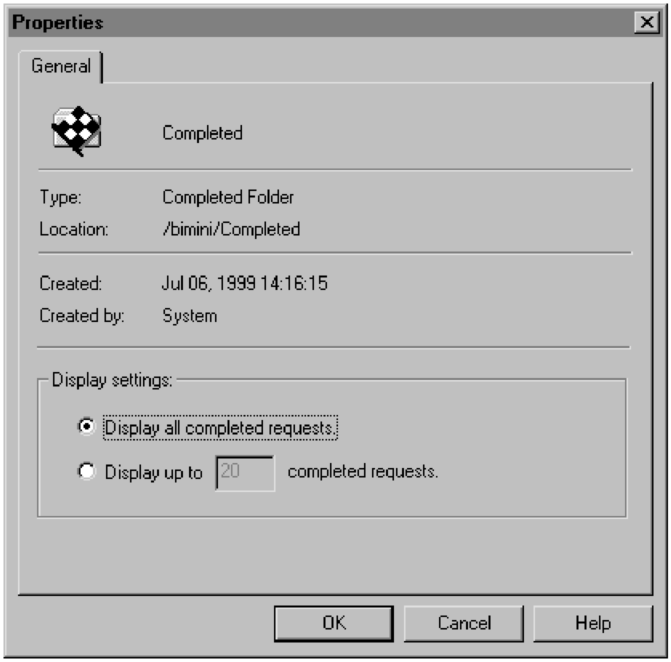
The following illustration shows the contents in a user’s Completed folder, and the context menu associated with completed requests.



The Completed folder contains requests that have been processed, including those that failed to generate a report. Failed requests are represented by this icon:  To get information about why the request failed, right-click the icon, then select Properties from the context menu.

Changing the number of completed requests displayed

You can limit the number of requests that are visible in the Completed folder by changing the Display settings in the Completed folder Properties dialog. Right-click the Completed folder and select Properties to display the Properties dialog. Select either Display all completed requests, or set the number of requests to display.



Viewing reports in the Completed folder

To view a report in the Completed folder, right-click the request icon or the name of the job, then choose View Report from the context menu. The report opens in the Viewer.

Creating requests in the Completed folder

To create request to run a report from the Completed folder, right-click the request icon or the name of the job, then choose New Request from the context menu. The Requester dialog box appears. The Report Encyclopedia runs the report displayed in the General tab.

To create a request that uses the same parameters as the completed request, right-click the request icon or the name of the job, then choose Retry completed request from the context menu. A confirmation dialog box appears. Choose Yes to resubmit the request.

Getting more details about a completed request

To get more details about a request in the Completed folder, right-click the request icon or the name of the job, then choose Properties from the context menu. The Properties dialog box that appears displays additional information, such as the time the report was run, the size of the finished report, the priority it was scheduled with, the full path names of the executable and report files, and so on.

Printing completed request information

You can print completed request information from the Summary tab of the completed request Properties dialog box.

Deleting requests in the Completed folder

Requests remain in the Completed folder until you delete them. To do so, right-click the request icon or the name of the job, then choose Delete Completed Request. You cannot recover a deleted request.

To delete all the requests in the Completed folder, use the Requests folder's context menu. Right-click the Requests folder and select Delete completed notices.

Users can automatically delete completed requests after a specified amount of time. The setting is a user property. For information about user properties, see “Changing user properties,” in Chapter 4, “Running a report from the desktop.”

Chapter

5

Searching for and exporting report data from the desktop

This chapter contains the following topics:

- About Actuate report searches
- Using basic searching techniques
- Executing a single-object search
- Using search results
- Executing a multi-object search
- Using operators and wildcards in search expressions
- Specifying data to display in the Results page
- Using search definition files
- Exporting report data

About Actuate report searches

Using the Actuate report search feature you can:

- Perform complex searches on the data in an Actuate report document.
- Save the search criteria and search settings as a search definition.
- Export all or part of the data from an Actuate report to a file.
- Transfer report data to other applications.

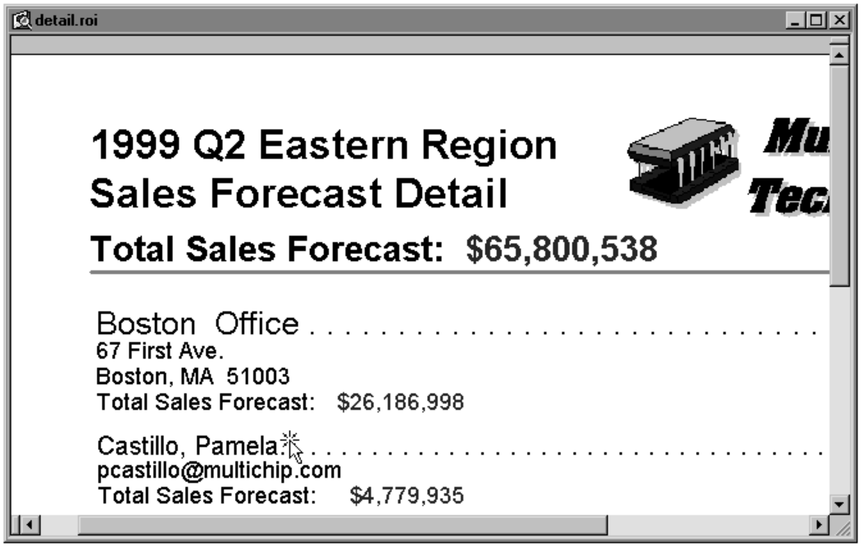
Using basic searching techniques

You begin a search by selecting a searchable object in a report. Then, you add the selected object to the Search dialog box and specify the value to find.

How to find searchable objects

As you move the cursor around the report, you notice the cursor shape changes to an arrow with an active symbol at the tip. The change in cursor shape indicates that an object is searchable.

The following illustration shows a searchable object in the sample report, DETAIL.ROI.



Use a single mouse-click to highlight or select a searchable object. The search cursor lets you select only one object at a time. For information about searching multiple objects, see “How to select multiple objects to search,” later in this chapter.

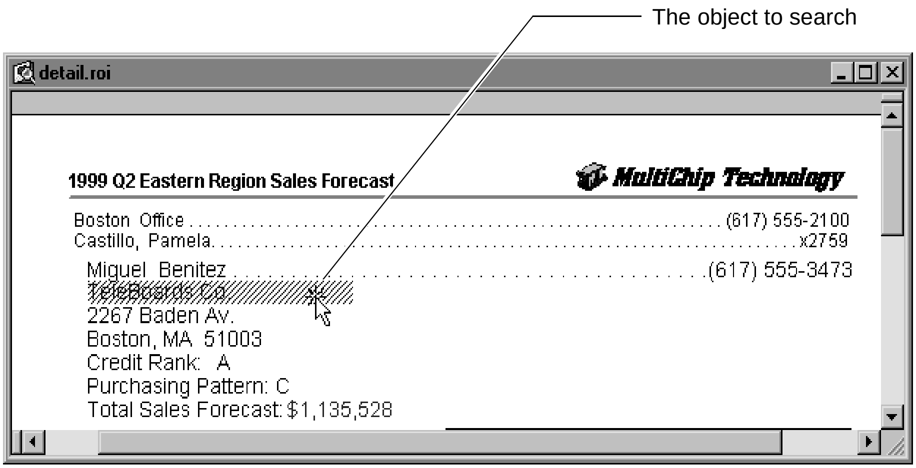
Executing a single-object search

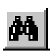
This section walks through the process of executing a single-object search. In the following example, the objective is to find all companies whose names start with the word Advanced in the sample report, DETAIL.ROI.

How to execute a simple search

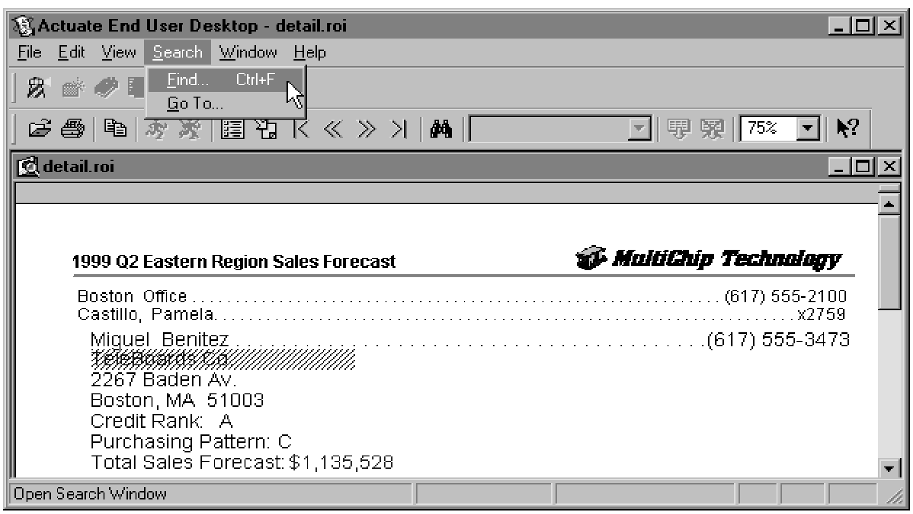
1 Select a searchable object from the report. In this example, select a company name such as “TeleBoards Co.”

You can select any company name because the purpose of this step is to specify the object—CompanyName—to search, not the object’s value. You specify the value to search in a later step.



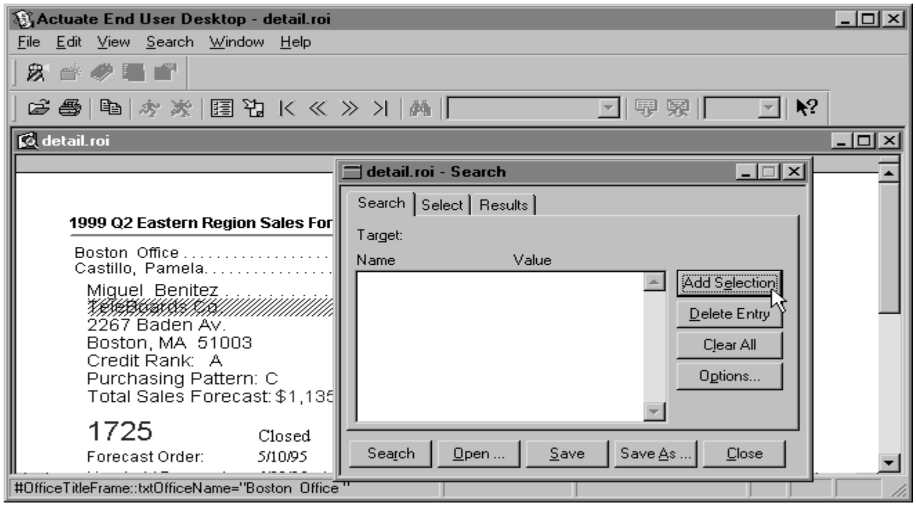


2 Choose Search→Find or the Search toolbar button to activate the Search dialog.



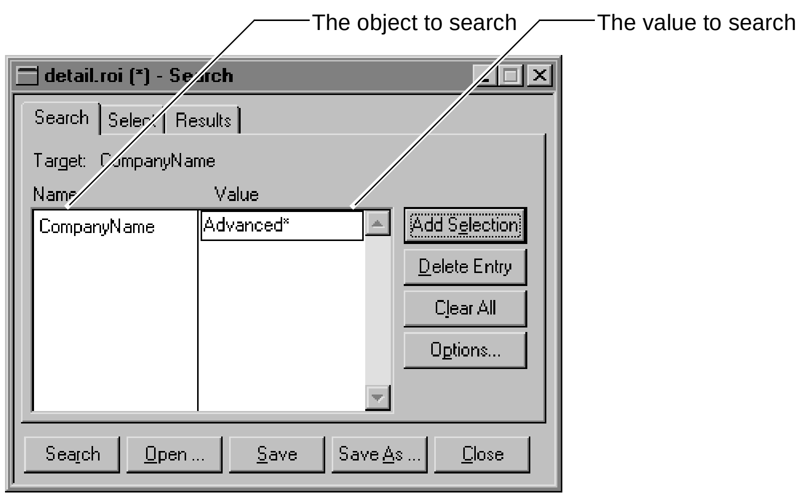
The Search dialog box appears.

3 To use the selection as criteria for your search, choose Add Selection.



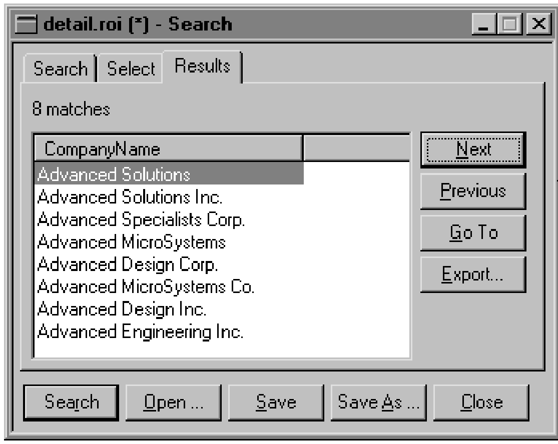
4 In the Value column, specify the value to search. In this example, type Advanced*.

The asterisk (*) is a wildcard that specifies you want to find all values that contain "Advanced" in the first part of the string, and any number of characters after that.



5 Choose Search to start the search process.

Matches to the search target appear in the Results page in order of their occurrence in the report.



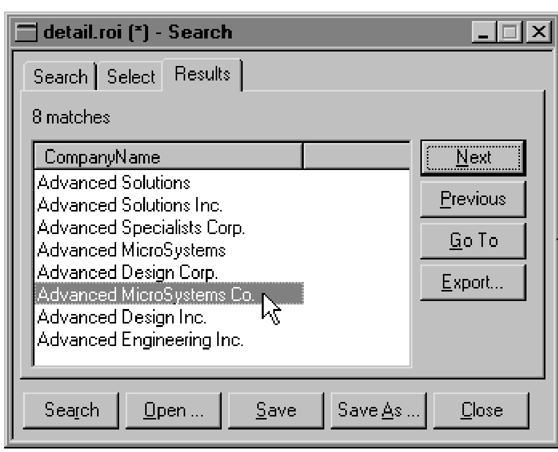
The search results in eight companies whose names start with Advanced

Using search results

The Results page displays the matches found in the report. You can go to the page containing any of those matches directly from the Results page. The following example shows the matches retrieved from a search for all company names that begin with "Advanced", and how to use the results to go to specific matches in the report.

How to use the Results page to go to a specific match in the report

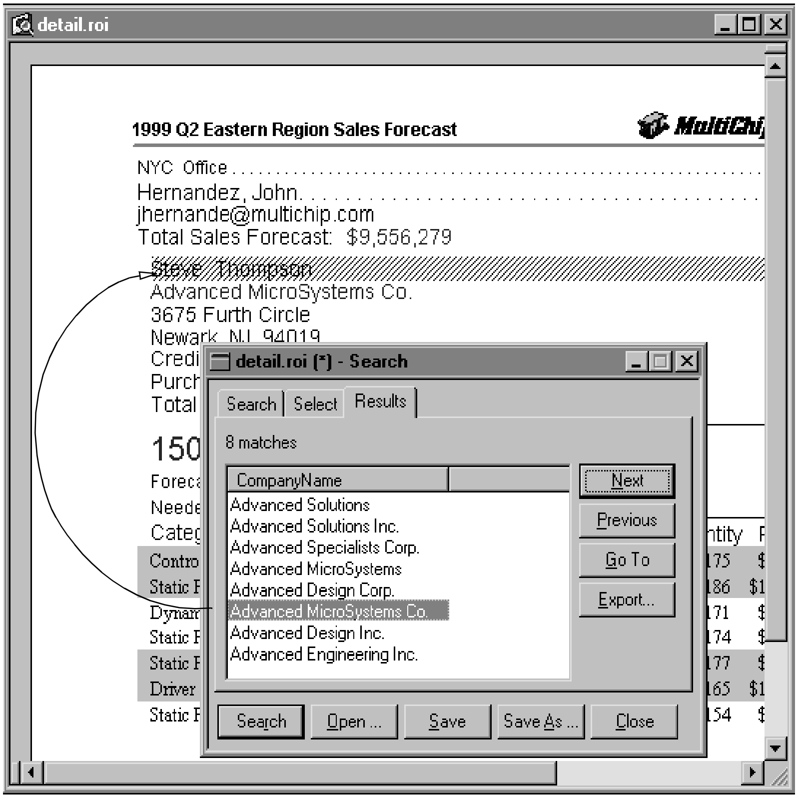
1 Select the match you wish to see.



To go to a match in the report, select the company name, then choose Go To

2 Choose Go To or double-click the selection.

The report becomes active and displays the matching value. If you selected Advanced MicroSystems Co. as shown in the previous illustration, the page containing the company name, Advanced MicroSystems Co., appears. The company name is highlighted.



3 To go to another match in the report, use the Next, Previous, or Go To button in the Results page.

Executing a multi-object search

You can select multiple objects from a report to add to the search criteria to execute a more specific search. For example, instead of just searching for company names that start with "Advanced", you can search for company names that start with "Advanced" and that are located in Boston.

The number of conditions on which you can search is limited only by the number of objects in the report. Each condition you add to the search criteria adds an And logical operation. For example, if you specify three objects and values for the search, the search expression in effect is condition1 And condition2 And Condition3. There is a match only if all conditions are true.

Depending on your report design, some multi-object searches result in no matches even if data matches the search values. Actuate displays a warning message when you select objects that will result in no matches.

The following sections explain the basic techniques for a multi-object search, and provide two examples of executing multi-object searches.

How to select multiple objects to search

There are two ways to select multiple objects from a report:

- Hold down the Shift key and use mouse clicks to select each object you wish to include in the group of objects.
- Use the left mouse button and drag a rubberband to select the area containing the group of multiple objects.

Using either method, when you release the mouse button, all the selected objects are included in your search.

How to add objects to a search

Actuate provides the capability to add objects to your search after you begin searching:

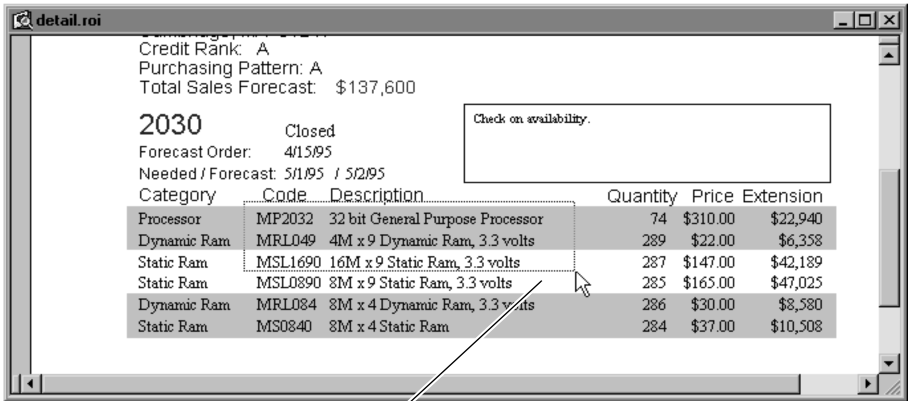
1. Leave the Search dialog box open.
2. Return to the report behind it to select other objects.
3. Choose Add Selection after selecting each object.

How to search for specified values on two objects

In this example, a search finds orders of item code MP1632 that exceed 500 units. DETAIL.ROI is the report used in the example:

1. Select searchable objects from the report. In this example, rubberband several objects that include both the item code and the quantity objects.

   The rubberband draws a boundary around the search objects. For the selection to be successful, the entire object must be within the rubberband area. To deselect a previously selected object, double-click somewhere in the white space around the report.

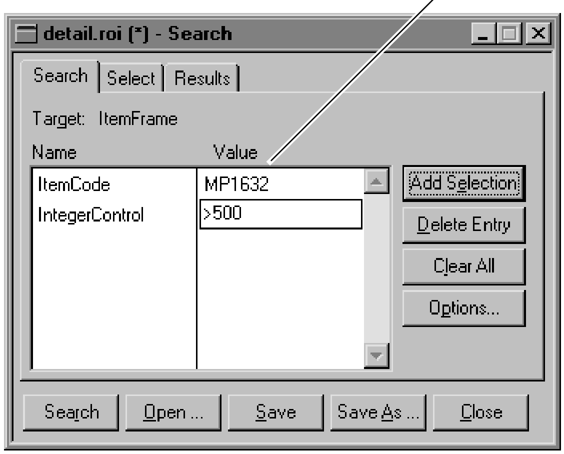


You can use the rubberband to select multiple objects for the search

2 To narrow the search criteria, delete the objects you want to exclude from the search. In this example, delete ItemDescription and Price.

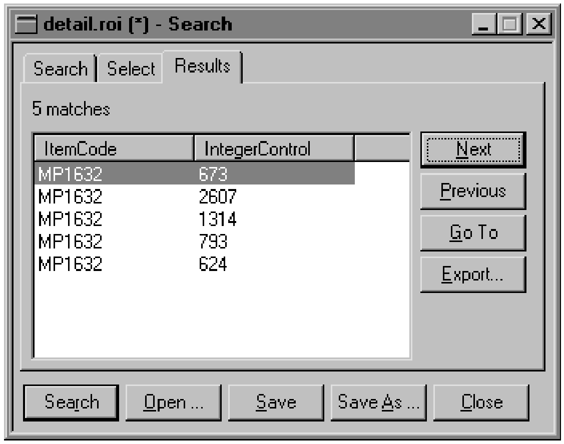
3 Specify the values to search. In this example, type the values as shown in the following illustration to retrieve orders for item code MP1632 in which the quantity exceeds 500.

Type the values to search



4 Choose Search to begin the search process.

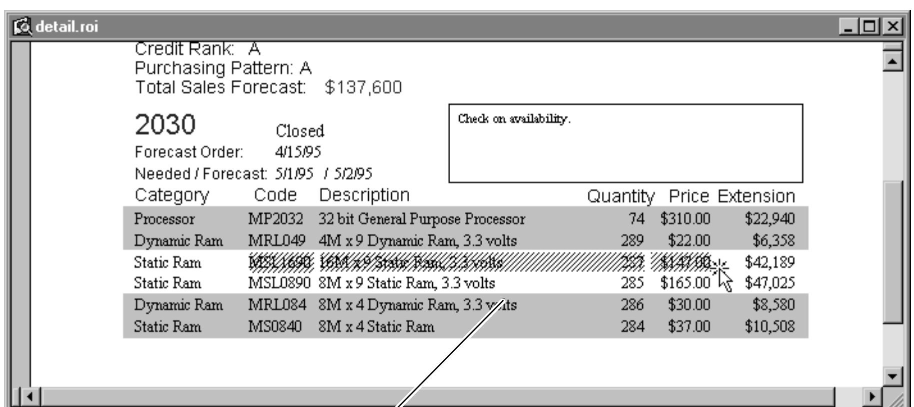
The search results appear in the Results page.



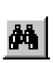
How to add and delete objects from a multi-object search

This example shows how to add and delete objects from the search, as well as how to modify the values to search. DETAIL.ROI is the report used in the example:

1 Select searchable objects from the report. In this example, select the following objects under the following column headings, Code, Description, Quantity, and Price.



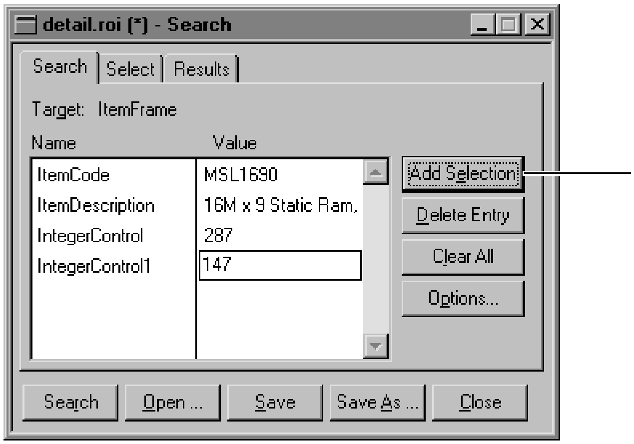
You can use Shift+click to select multiple objects for the search



2 Choose the Search toolbar button or Search from the report's context menu to activate the Search dialog.

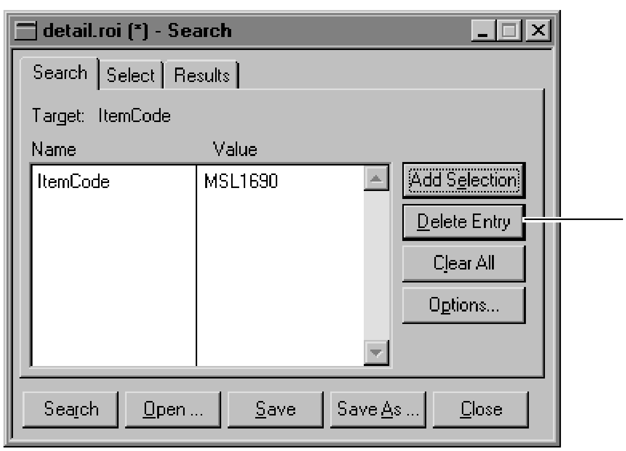
3 Choose Add Selection.

As the following illustration shows, the item code, description, quantity, and price objects (indicated as Integer Controls) are added to the search. The names that appear in the Name column are not the same as the descriptive column headings that appear in the report. They are the names of the objects as assigned by the report developer at design time.



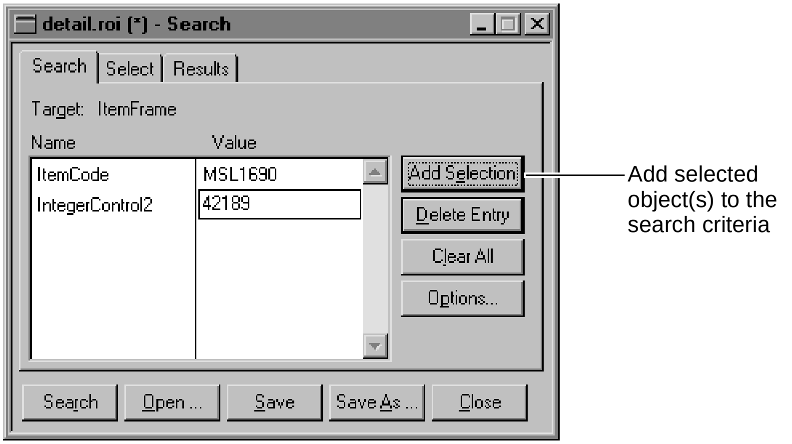
Choose Add Selection to add the objects you selected in the report to the search criteria

4 To delete an object, select it and choose Delete Entry. In this example, delete ItemDescription, IntegerControl, and IntegerControl1.



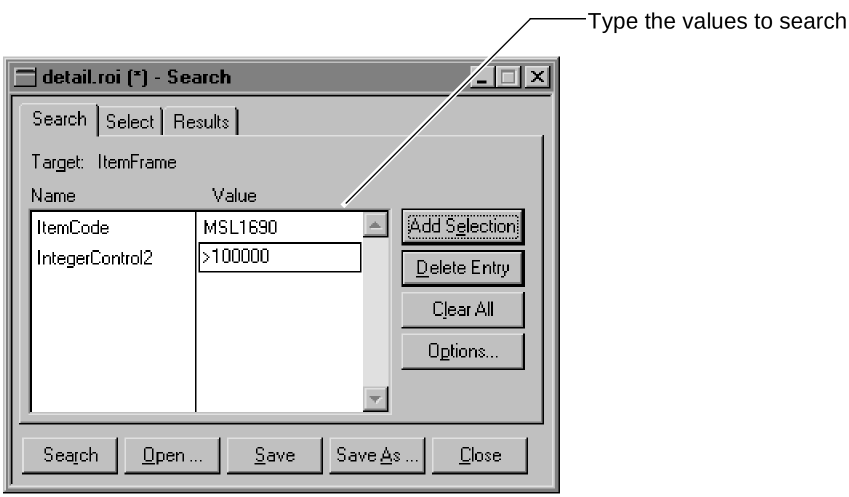
Delete an object from the search criteria

5 To add another object, leave the Search dialog box open and select a new object from the report behind it. In this example, add the Extension Price object to the search.



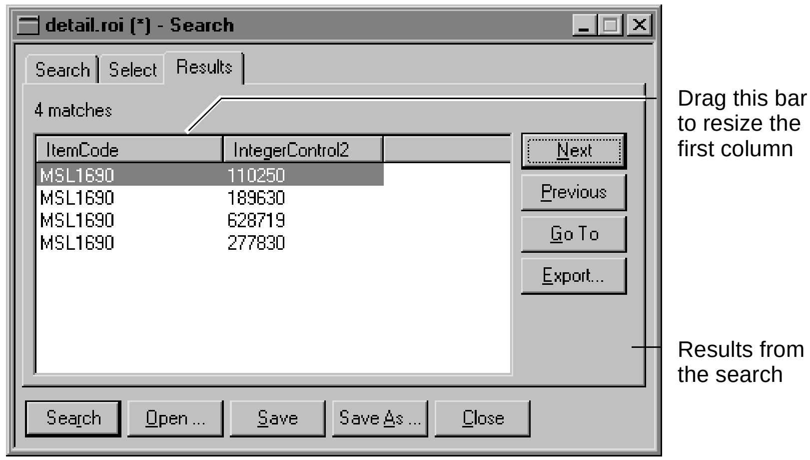
6 After selecting the objects on which to search, you can specify the values to search. For this example, change the IntegerControl2 (which represents the extension price) value in the Value column to > 100000.

The search now looks for orders of item code MP1632 which have an extension price greater than $100,000.



7 Choose Search to execute the search.

The search results appear in the Results page. Results for multi-object searches are formatted in columns, as the following illustration shows. You can resize the width of the columns.



Using operators and wildcards in search expressions

Use operators and wildcards in search expressions in the Value column of the Search page to narrow or widen your search.

To search an integer control, an operator compares numbers. To search a text control, an operator compares letters. For instance, the expression "> Moore" as the value for the SalesRep object would find all the names that fall after "Moore" in the alphabet.

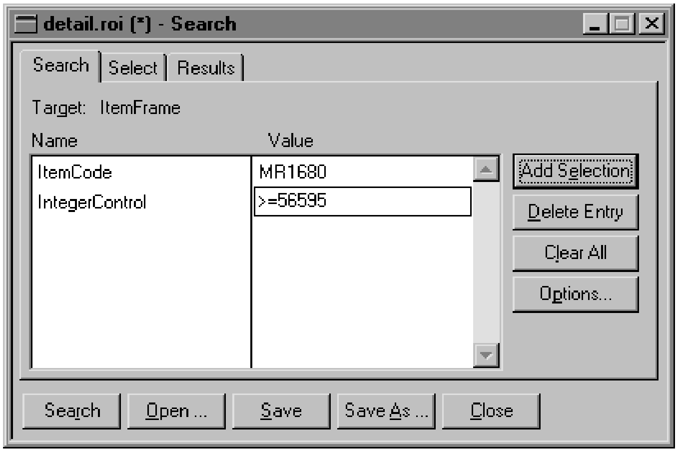
Using operators and symbols in a search expression

Actuate accepts the following operators and symbols.

Symbol	Meaning
=	Equals or is the same as
>	Greater than or alphabetically after
<	Less than or alphabetically before
>=	Greater than or equal to
<=	Less than or equal to
-	Range (hyphen separates upper and lower limits of the range)

Symbol	Meaning
,	Or (comma separates two values)
!	Not

The following example shows a search in the sample detail sales report for all orders for item code MR1680 that are greater than or equal to $56,595.



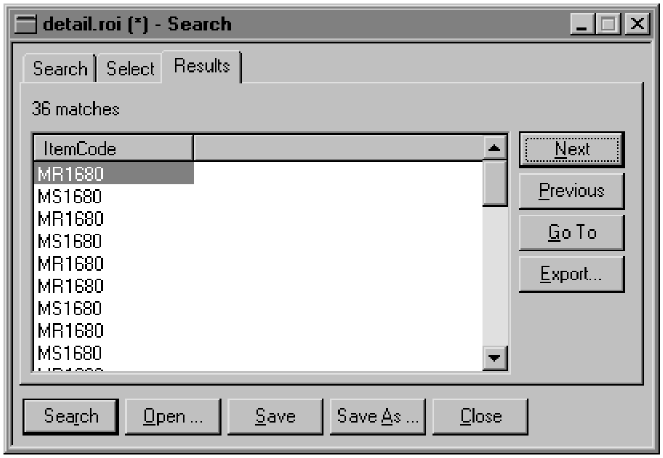
Using wildcards in a search expression

Use wildcard characters to do pattern matching on text objects. Actuate accepts the following wildcards.

Wildcard	Meaning
?	Find any one character
*	Find any number of characters
#	Find any one ASCII numeric character (0-9)

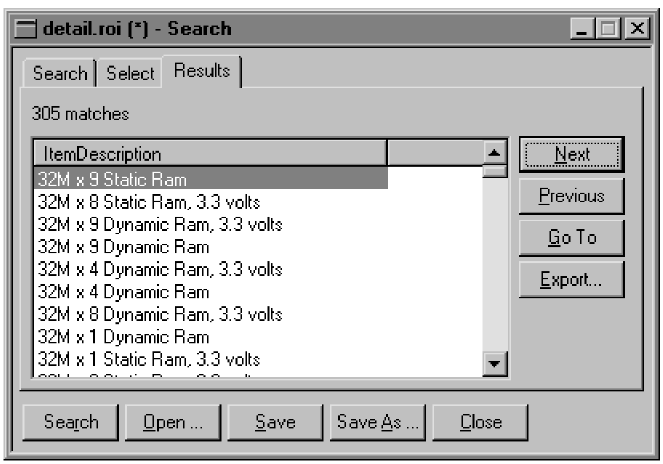
Using the ? wildcard in a search expression

The following illustration shows the results of a search in the samples sales detail using the ? wildcard. We search the report for the ItemCode “M?1680”. This search retrieves only those item codes that begin with “M”, end with “1680”, and are exactly six characters long.



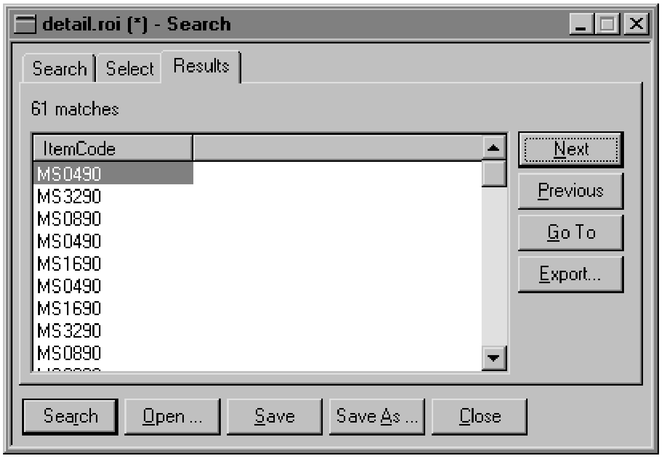
Using the * wildcard in a search expression

The following illustration shows the results of a search in the sample sales detail using the * wildcard. We search the report for the ItemDescription "32M*". This search retrieves all items with descriptions of any length that begin with "32M".



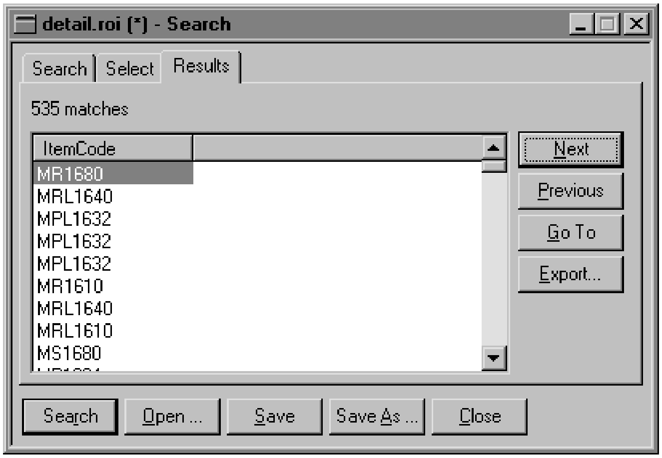
Using the # wildcard in a search expression

The following illustration shows the results of a search in the sample sales detail using the # wildcard. Use the pound sign to exclude characters other than the numeric characters zero through nine from your search. For example, "MS??90" or "MS*90" matches both "MSL390" and "MS1690". "MS##90" limits the search to codes in the “MS” group. The following illustration shows the results of the search for the item code “MS##90”.



Using multiple wildcard characters in a search expression

Use a wildcard character multiple times in a single value to broaden a search. For example, the following illustration shows the results of a search in the sample sales detail report for the item code “M*16*”. This search retrieves all item codes that begin with “M” and contain “16”.

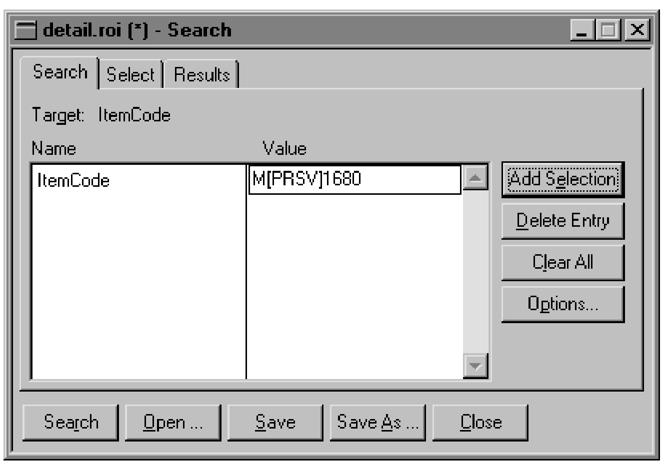


Using patterns in a search expression

Use patterns in a search expression to qualify a search. Patterns allow you to look for characters in a range or to select only certain characters for searching. Use the brackets ([ ]) to place a pattern inside a search term. The following table defines pattern meanings and provides examples of using patterns in a search.

Pattern	Meaning	Example
[character list]	Match any one character inside the brackets.	[M]16 In this example, match the M.
[a-z0-9]	Match any lowercase character and ASCII numeric character	a-c and 1-3
[a-z-]	Match any character or hyphen	*a-*
[^a-z0-9]	Match any character other than lowercase or ASCII numeric	^Z
[^]	Match one caret	^and

The following illustration shows a search in the sample sales detail report for item codes “MP1680”, “MR1680”, “MS1680”, or “MV1680”.



Searching for the characters ?,*,#, and [ ]

Because the characters ?, *, #, and [ ] have special meanings in search expressions, you must indicate when you want to search for the characters themselves. Use the backslash (\) before any special character to search for the character itself, or place the character inside brackets. The following table defines some special characters.

Special characters	Definition
[?] or \?	Match one question mark
[#] or \#	Match one pound sign
[*] or *	Match one asterisk
[[] or \[	Match one open bracket
[]] or \]	Match one close bracket
[\[-\]]	Match any ASCII character code between "[" and "]"

Using special characters in a text string

If a search text string contains one or more special characters, it must be enclosed in quotation marks ("). Special characters include:

- Comma (,)
- Hyphen (-)
- Exclamation point (!)
- Less than sign (<)
- Greater than sign (>)
- Equal sign (=)

For example, the string:

16M x 1 Dynamic Ram, 3.3 volts

must be enclosed in quotation marks as follows:

"16M x 1 Dynamic Ram, 3.3 volts"

If this string is not enclosed in quotation marks, the comma is interpreted as an OR in SQL, for example:

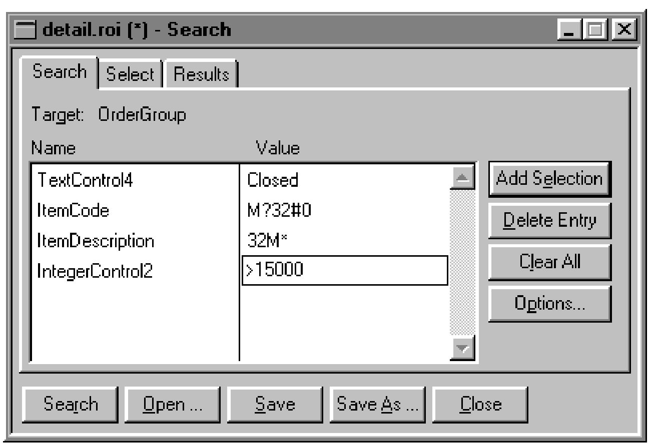
```
WHERE items.itemcode LIKE '16M x 1 Dynamic Ram%'
OR items.itemcode LIKE '3.3 volts%'
```

Using nonprinting ASCII characters in a search

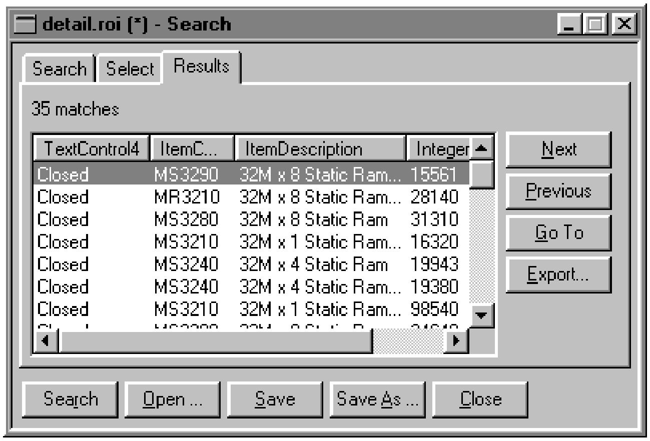
Tabs, line feeds, and carriage returns are examples of nonprinting ASCII characters. With the backslash as an escape character, use the following nonprinting ASCII codes in search expressions.

Special characters	Definition
\	Escape next character (one- or two-byte character)
\a	Match one alarm (0x07)
\b	Match one backspace (0x08)
\t	Match one tab (0x09)
\n	Match one new line (0x0a)
\f	Match one form feed (0x0c)
\r	Match one carriage return (0x0d)
\\	Match one backslash (\)
[\1-\377]	Match any one-byte character excluding NUL (0x00)
[\x100-xffff]	Match any two-byte character

The following illustration is a search of the sample sales detail report for closed orders in excess of $15,000 that are for items whose description contains "32M" and whose item code is in the "Mx" group and in the "32x0" range.



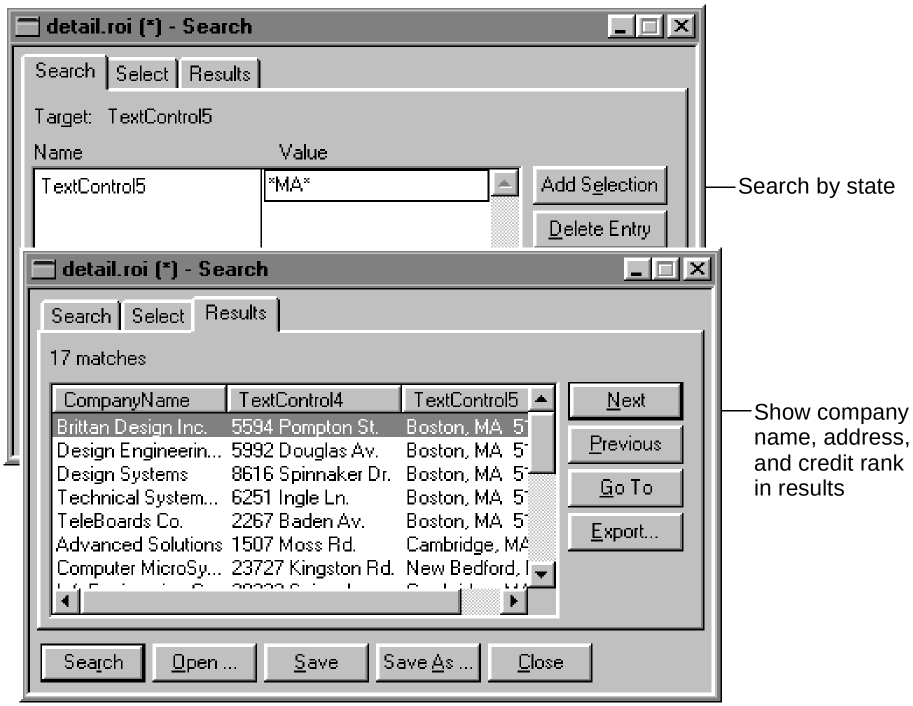
The following illustration shows the search results.



Specifying data to display in the Results page

Besides displaying the results of a search, the Results page can display data from other objects in a report. If, for example, you search for companies by state, the Results page displays, by default, only the company names that match the search criteria. You might, however, also want to display the full company address and credit rank next to the company name, as shown in the following illustration.

Text fields displayed in the Results page have a limit of 255 characters. For example, each field under CompanyName can be 255 characters in length. If a text field in a report has more than 255 characters, the first 255 characters are used. For more information about exporting all the characters from a text field, see "Exporting search results," later in this chapter.



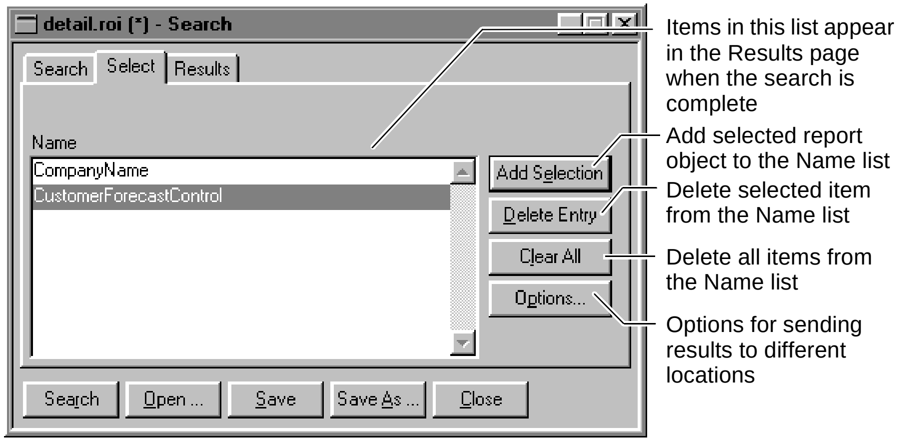
You can specify any number of object values to display in the Results page. This capability is useful for creating a quick view of particular data in a report.

How to specify object data to display in the Results page

The instructions in this section assume you have already specified the search criteria. For more information about specifying search criteria, see “Executing a single-object search” and “Executing a multi-object search,” earlier in this chapter.

1 Choose the Select tab of the Search dialog box.

The Select page appears. By default, the name of the object or objects you selected as criteria for the search appears in the Name column. The values to these objects, in turn, will appear in the Results page after you execute the search.



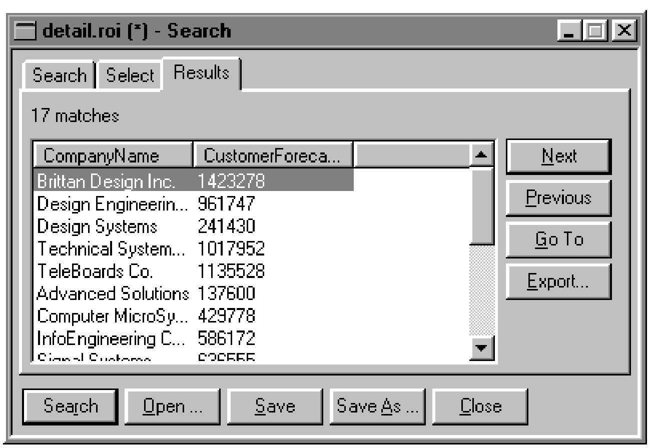
2 If you want the Results page to display only some of the objects, select each object to exclude. Then choose Delete Entry. To exclude all objects, choose Clear All.

3 To specify additional objects, select each object you want to add. Then choose Add Selection on the Select page.

The names of the objects you select appear in the Name list.

4 Choose Search to start the search process.

The search results appear in the Results page.



Using search definition files

Actuate ReportQuery extends the report search functionality. You can save and use searches stored in search definition (.ROS) files on an Actuate report document.

Actuate saves the following information in a search definition file:

- Search criteria in the Search page
- Data to display in the Select page
- Options in the Search Export Options dialog box
- Report document structure information

You can use search definition files with different report document (.ROI) files if they are generated from the same report executable (.ROX). For example, if you have a report executable that you use to create weekly reports, you can create a search definition that searches for and extracts data from the report. You can use the same search definition file with any weekly report as long as the report executable has not changed.

You can run a search definition from either the Search dialog box or from the toolbar. For more information about opening and running a search definition see “Opening and running a search definition,” later in this chapter.

For information about creating searches and specifying data to be returned from searches, see “Using basic searching techniques,” “Executing a single-object search,” “Executing a multi-object search,” “Using operators and wildcards in search expressions,” and “Specifying data to display in the Results page,” earlier in this chapter.

For information about the options available for exporting data, see “Exporting report data,”later in this chapter.

Saving a search definition

After you have set up a search, you can save the search criteria and options in a search definition (.ROS) file. Choose Save in the Search dialog box to save the search definition. The search definition file is saved in the Actuate search definition directory. If you use the default installation directory, the search definitions are saved in C:\actuate\srchdef.

The report document structure information is used when Actuate runs the search on a report document.

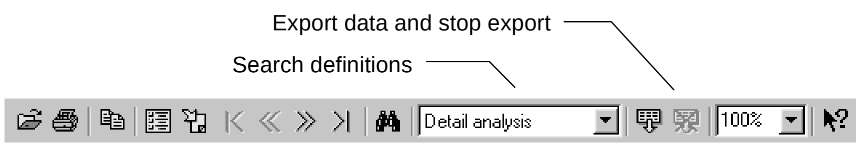
Opening and running a search definition

You can open and run a search definition from either the Search dialog box or from the toolbar. You can open and use a search definition file only from your local computer. The report document can be in the Report Encyclopedia or on a system that you have access to. The search definition file must be on your system or another system that you have access to outside the Report Encyclopedia. Actuate searches for the search definition files in the report document directory and the Actuate search definition directory. If you use the default installation directory, the search definition directory is C:\actuate\srchdef.

If the search definition file cannot be used with the current report, Actuate displays a message when you try to use it.

From the Search dialog box, choose Open to open a search without running it. Choose Start to run the search.

From the toolbar, select a search definition from the list of search definitions and select the Export data button to open the search and run it.



In the toolbar, the list of search definitions lists the search definition files that are in the same directory as the report document and the search definition directory. If you select the Export data button after selecting a search from the list Actuate opens and runs the search.

If you have a search definition file that exports data to an application, using Export data from the toolbar runs the search, exports the data, and starts the application.

Exporting report data

There are two ways to export data from an Actuate report to another document:

- Use Actuate's search feature to select only report data that meet specified criteria and to send that data to an ASCII file, the Clipboard, or an application. Using this technique, you are, in effect, creating a new report from the original report.
- Select text or images in the report itself, copy the selection, and paste the selection in the destination document. This technique is similar to the

standard copy-and-paste operation available in other Windows applications.

Exporting report data to an application can be done only on 32-bit Windows systems such as Windows 95/98 or Windows NT.

Exporting search results

When you use Actuate's search feature to locate and display report object values that meet specified criteria, you can also copy the search results to the Clipboard, or export them to an ASCII file or an application. You can choose to export the entire result set or only a portion of it.

If you export search results from the Results page, each text field exported is limited to the first 255 characters. If you export search results directly as part of the search, the entire text field is exported.

Your exported file can also be used as the data source for another report. For information about using an ASCII file as a data source, see *Programming e.Reports* which is part of the Actuate Developer Workbench documentation.

Using Actuate search extensions, a part of Actuate Transporter technology, you can export all or part of the results of a search to:

- Microsoft Excel spreadsheets
- Brio Technology BrioQuery documents
- CorVu Graphical Analysis Module using a CorVu TAB file
- Text files

For information about the Actuate search extensions, see "Using the search extension options dialog box," later in this chapter.

For information about installing and using custom search extensions, DLLs that Actuate uses to export data directly to other applications, see the documentation for the custom search extension. If the search extension uses the default Actuate search extension directory, add the search extension to the Actuate search extension directory.

How to export all of the search results

The instructions in this section assume you have already specified search criteria and selected the objects whose values you want to appear in the result set. For information about specifying search criteria, see "Using basic searching techniques," "Executing a multi-object search," and "Specifying data to display in the Results page," earlier in this chapter.

1 To export the search results to a file or Clipboard, perform one of the following steps:

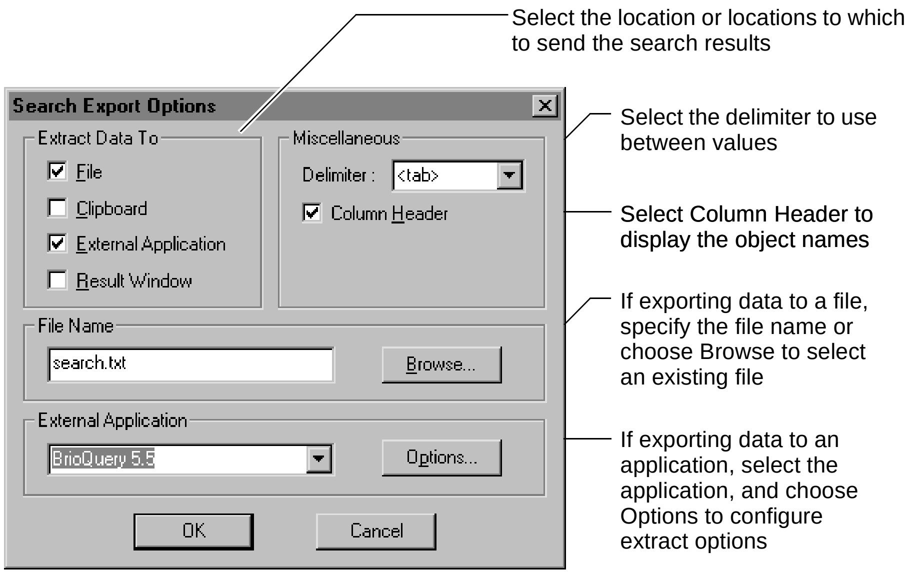
1 Choose Options in the Search page or Select page.

2 Choose Search, then Export in the Results page that appears.

If you export search results from the Results page, each text field exported is limited to the first 255 characters. If you export search results directly as part of the search from the Search or Select page, the entire text field is exported.

The Search Export Options dialog box appears. The options differ slightly, depending on whether you access the dialog box from the Search page, Select page or the Results page.

The following illustration shows the Search Export Options dialog box accessed from the Select page.



2 Select the location or locations to which to send the search results. Portions of the dialog box are enabled or disabled, depending on the export locations you select:

- If the location is a file or the Clipboard, select the delimiter to use between values if the result set contains values from multiple objects. You can select a tab, comma, or space.

  Select Column Header to include the names of the objects as column headings when exporting data.

- If the location is a file, specify a file name or use the default file name.
- If the location is an external application, select the application from the list and choose Options to set the options. For information about the

options, see “Using the search extension options dialog box,” later in this chapter.

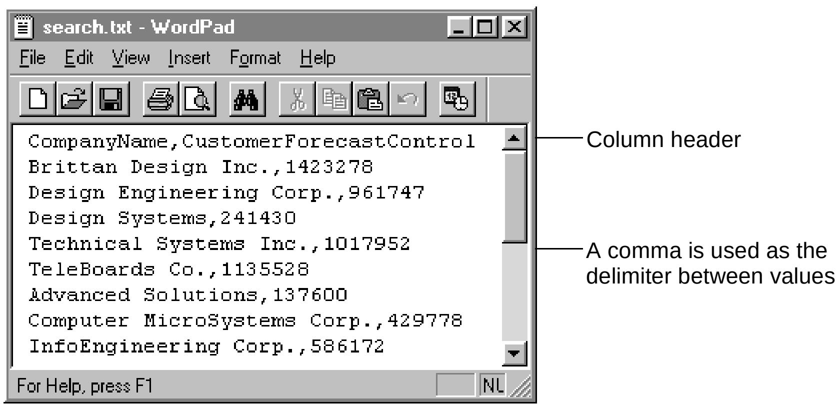
3 When you have finished selecting the desired options, choose OK.

If you accessed the Search Export Options dialog box from the Select page, the Select page reappears.

If you accessed the dialog box from the Results page, Actuate sends the data to the locations specified in step 2.

4 If you are at the Select page, choose Search to start the search process.

The search results appear in the locations specified in step 2. If you used the settings as shown in the previous illustration, the results are written to SEARCH.TXT. The following illustration shows the contents of the file opened in WordPad.



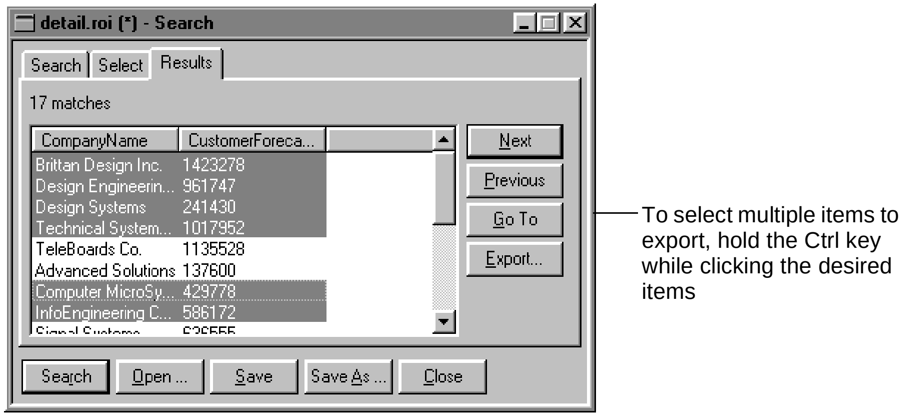
How to export a portion of the search results

The instructions in this section assume you have already specified search criteria and selected the objects whose values you want to appear in the result set. For information about specifying search criteria, see “Using basic searching techniques,” “Executing a multi-object search,” and “Specifying data to display in the Results page,” earlier in this chapter.

1 Choose Search to start the search process.

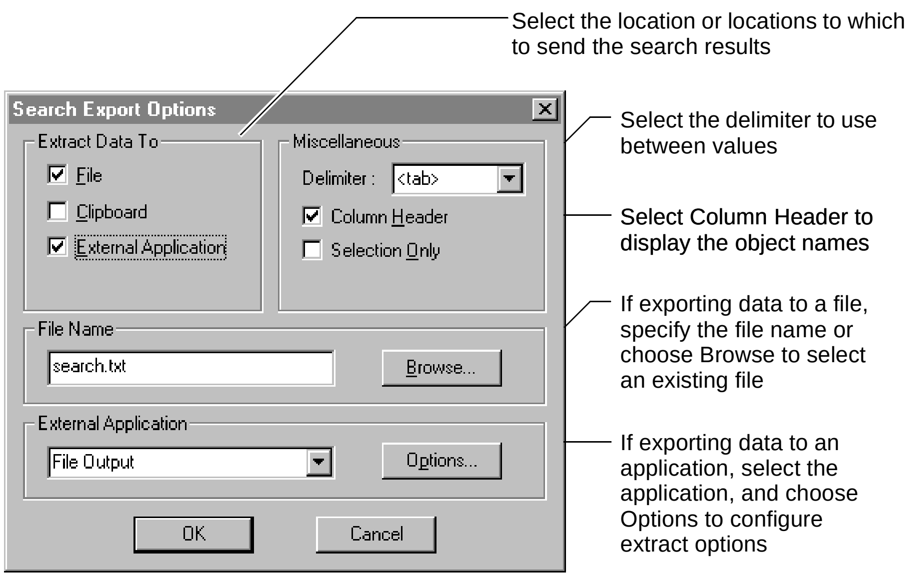
The search results appear in the Results page.

2 Select the matches you want to export.



3 Choose Export.

The Search Export Options dialog box appears.



4 Select the location or locations to which to send the search results. Portions of the dialog box are enabled or disabled, depending on the export locations you select:

- If the location is a file or the Clipboard, select the delimiter to use between values if the result set contains values from multiple objects. You can select a tab, comma, or space.

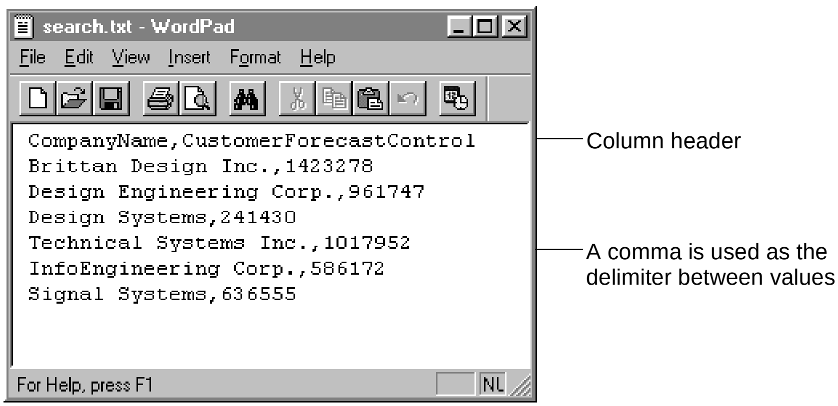
  Select Column Header to display the names of the objects in the result set.

- If the location is a file, specify a file name or use the default file name.
- If the location is an external application, select the application from the list and choose Options to set the options. For information about the options, see "Using the search extension options dialog box," later in this chapter.

5 Select Selection Only to export only the items you selected in step 2.

6 When you have finished selecting the desired options, choose OK.

Actuate sends the data to the locations specified in step 4. If you used the settings as shown in the previous illustration, the results are written to SEARCH.TXT. The following illustration shows the contents of the file opened in WordPad.



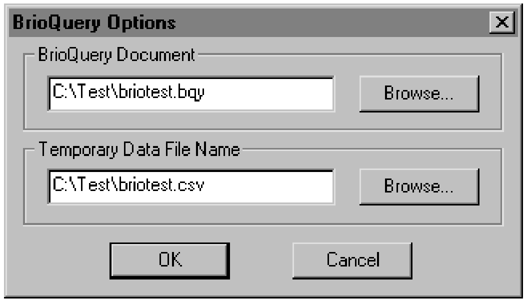
Using the search extension options dialog box

The next sections describe the fields in the Options dialog box you use for the different search extensions, BrioQuery, CorVu, Microsoft Excel, and text file. The configuration requirements for the BrioQuery and CorVu search extensions are also described.

Using BrioQuery search extension options dialog box

The following fields are in the BrioQuery Options dialog box:

- BrioQuery document specifies the destination BrioQuery document when the data is exported.
- Data file specifies the file name of the temporary data file used for transferring the data to BrioQuery. BrioQuery will read the data from this file. This field is required.



If you use BrioQuery 6.0 and change data stored in the temporary data file, choose the BrioQuery Process button in the BrioQuery web page to process the updated data. For example, you create an Actuate search that sends data to BrioQuery and then run the same search with different search criteria that updates the data in the temporary data file. Next you select the temporary data file in BrioQuery and choose the Process button to process the updated data.

Configuration requirements for the BrioQuery search extension

The search extension for BrioQuery versions 5.5 and 6.0 uses a BrioQuery document startup script to import data from a temporary data file created by Actuate. To use the BrioQuery search extension, you need to:

- Add the Brio executable directory installation directory to your system's PATH environment variable.
- Create a BrioQuery document containing a startup script that specifies the name of the file containing search data from Actuate.
- Set Actuate BrioQuery search extension options to specify a file containing Actuate data and a BrioQuery document.

To find the Brio executable directory, see your Brio documentation. To view and change your system's PATH environment variable, see your system documentation.

To create a BrioQuery document with the required document startup script, start BrioQuery. From the main menu, select FileDocument ScriptsStartup tab and add the following to the startup script:

- For BrioQuery 5.5, add the following two lines:

  ```
  import doc root, '<file name>', 'csv'
  process doc root
  ```

- For BrioQuery 6.0, add the following single line:

  ```
  ExecuteBScript("import doc root, '<file name>', 'csv'; process doc root")
  ```

The <file name> is the full path and file name of the temporary data file created by Actuate. The following is a BrioQuery 5.5 example:

```
import doc root, 'C:\Temp\briodata.csv', 'csv'
process doc root
```

The following is a BrioQuery 6.0 example:

```
ExecuteBScript("import doc root, 'C:\\Temp\\briodata.csv', 'csv'; process doc
root")
```

After you add the information, choose OK and save the BrioQuery document.

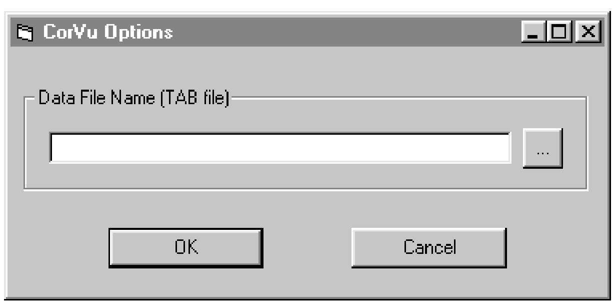
When using the Actuate BrioQuery search extension you need to specify the BrioQuery document containing the startup script and the file Actuate uses to temporarily store the Actuate data. In the Actuate Search Export Options dialog box, select BrioQuery 5.5 - 6.0 as the external application and choose the Options button to display the BrioQuery Options dialog:

- In the BrioQuery Document field, enter the name of the BrioQuery document you created.
- In the Temporary Data File Name field, enter the file name specified in the BrioQuery startup script.

After choosing OK, you can use the BrioQuery search extension to export Actuate search results to BrioQuery.

Using CorVu search extension options dialog box

The Data File Name field in the CorVu Options dialog box specifies the path and file name of the CorVu TAB file. This field is required. Use the Browse button to search for a file.



Data is transferred from the Actuate search results to the CorVu Graphical Analysis Module using the TAB file, a CorVu-specific data file, specified in this dialog box.

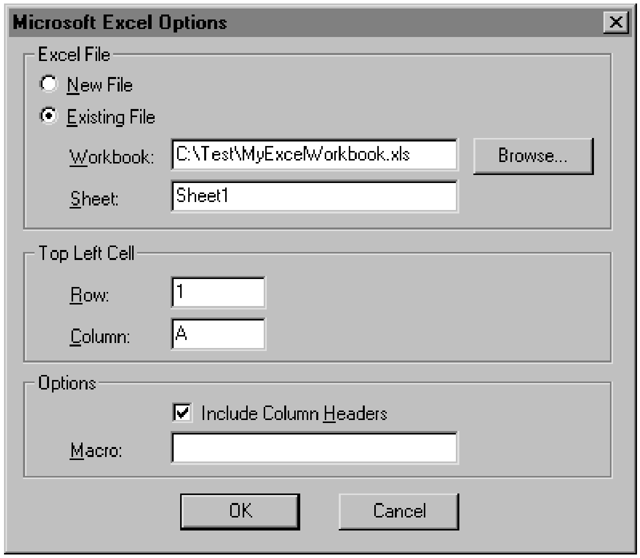
Configuration requirements the CorVu search extension

In order to use the CorVu search extension, the CorVu installation directory needs to be part of your system's PATH environment variable. To find the CorVu installation directory see your CorVu documentation. To view and change your system's PATH environment variable, see your system documentation.

Using Excel 97 search extension options dialog box

The following items are in the Microsoft Excel Options dialog box:

- New File specifies that the data is transferred into a new, blank Excel workbook.
- Existing File specifies that the data is transferred into the workbook specified in the Workbook field.
- Workbook specifies the name of the destination Excel workbook or document. This field is required if Existing File is selected.
- Workbook sheet specifies the destination sheet within the specified workbook. This field is optional.
- Row specifies the row number of the top left cell of the workbook sheet where the exported data is placed. This field is optional.
- Column specifies the column letter or letters of the top left cell of the workbook sheet where the exported data is placed. This field is optional.
- Include Column Header specifies if column headings are written to the workbook. The default value is Enabled.
- Macro specifies a macro that is executed after the data is transferred to the Excel workbook. This field is optional.

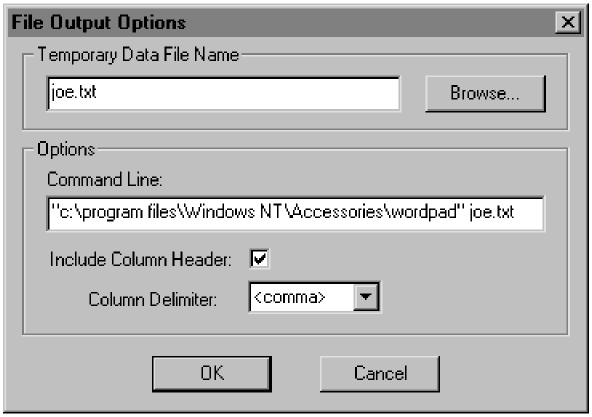


Using file output search extension options dialog box

The following items are in the File Output Options dialog box:

- Temporary Data File Name specifies the name of the output text data file. This field is required.
- Command line specifies a command line string that is executed after the data is written to the file. This field is optional.
- Include Column Header check box specifies if the column headers are included in the data file. The default value is Enabled.

Column Delimiter specifies the delimiter between data fields. The default value is Comma.



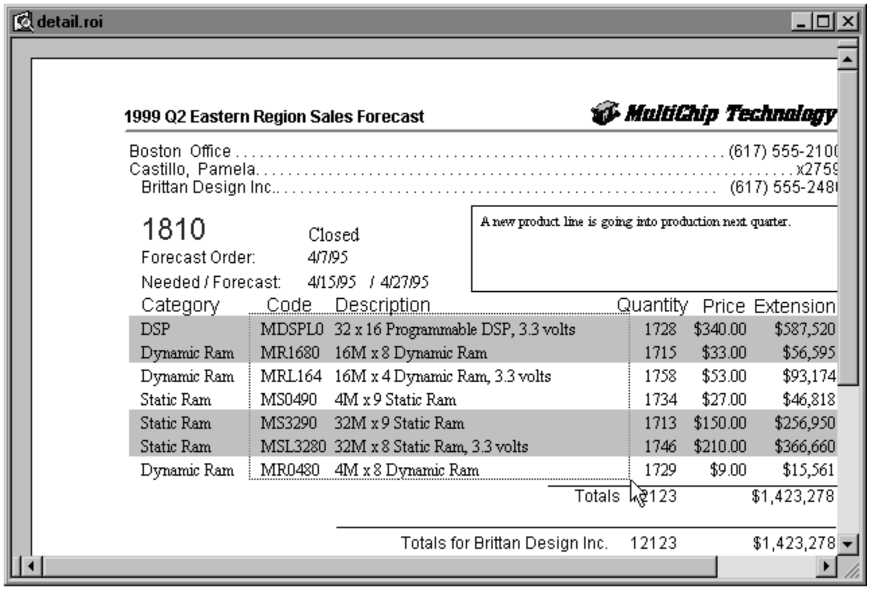
Copying report data to another document

You can copy data in the form of numbers, images, or text from an Actuate report and paste the data into another document. As with the standard Windows copy-and-paste operation, the report data you copy is stored in the Clipboard. You can then paste the data into any other document.

How to copy report data

1 Select text or images within a report. You can drag the mouse to enclose the area of interest, or hold the Shift key down and use the left mouse button to select multiple objects.

The following illustration shows a selected area in page 2 of DETAIL.ROI.

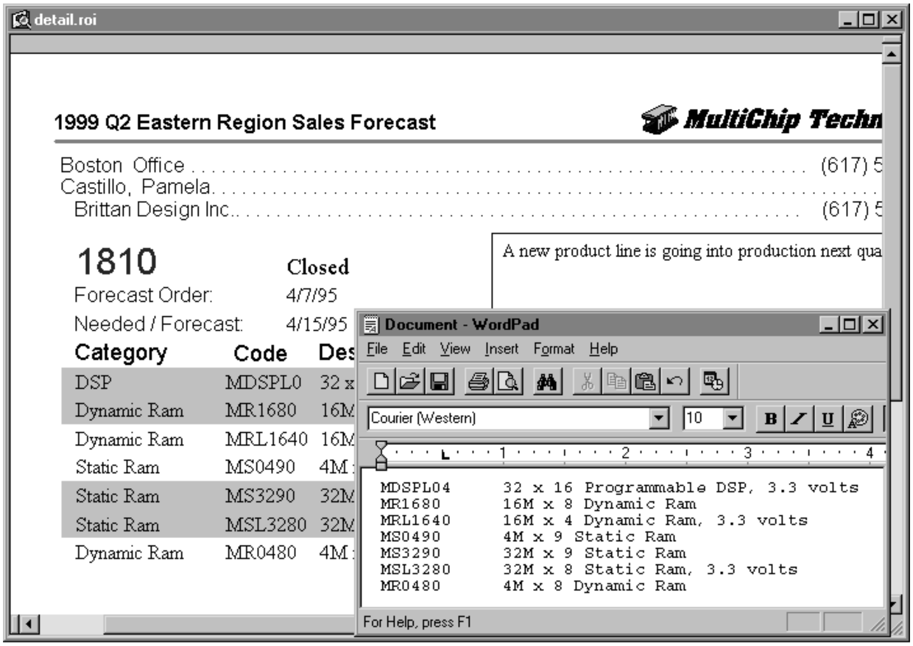


2 Choose the copy button on the Actuate toolbar.

3 Move to the destination document in an external application.

4 Use Edit→Paste in the destination document to insert the copy into the destination document.

The following illustration shows the report data pasted into a WordPad document.


detail.roi
1999 Q2 Eastern Region Sales Forecast
MultiChip Techn
Boston Office (617) 5
Castillo, Pamela
Brittan Design Inc. (617) 5
A new product line is going into production next qua
1810
Closed
Forecast Order: 4/7/95
Needed / Forecast: 4/15/95
Category Code Des
DSP MDSPL0 32 x
Dynamic Ram MR1680 16M
Dynamic Ram MRL1640 16M
Static Ram MS0490 4M
Static Ram MS3290 32M
Static Ram MSL3280 32M
Dynamic Ram MR0480 4M
Document - WordPad
File Edit View Insert Format Help
Courier (Western)
10
MDSPL04 32 x 16 Programmable DSP, 3.3 volts
MR1680 16M x 8 Dynamic Ram
MRL1640 16M x 4 Dynamic Ram, 3.3 volts
MS0490 4M x 9 Static Ram
MS3290 32M x 9 Static Ram
MSL3280 32M x 8 Static Ram, 3.3 volts
MR0480 4M x 8 Dynamic Ram
For Help, press F1

Chapter

6

Printing and distributing a report from the desktop

This chapter contains the following topics:

- Comparing viewing and printing
- Printing reports from your desktop
- Command line options for printing
- Saving reports in HTML format
- Printing reports in a Report Encyclopedia
- Setting printer properties in the Report Encyclopedia
- Running a report before printing
- Distributing a report from your desktop
- Distributing a report stored in the Report Encyclopedia
- Linked and embedded objects in the report

Comparing viewing and printing

A major feature of the Actuate reporting system is the live, interactive presentation of online reports. Actuate reports can also be printed.

Printing reports from your desktop

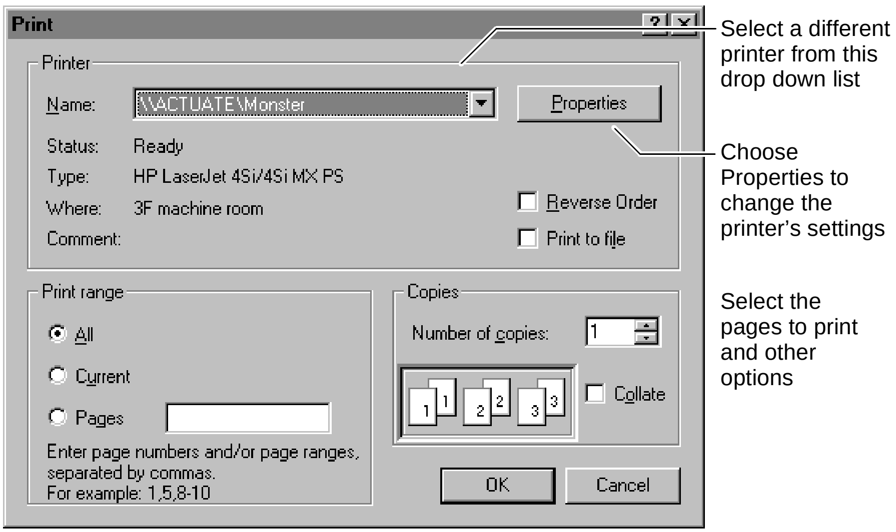
To print an Actuate report, you use the standard Windows procedure to select a printer and set printer properties. In addition, Actuate provides printing options specific to Actuate reports.

How to print a report from your desktop

1 Open the report you want to print.

2 Choose File→Print from the browser menu or the report's context menu, or choose the Print button from the Actuate toolbar.

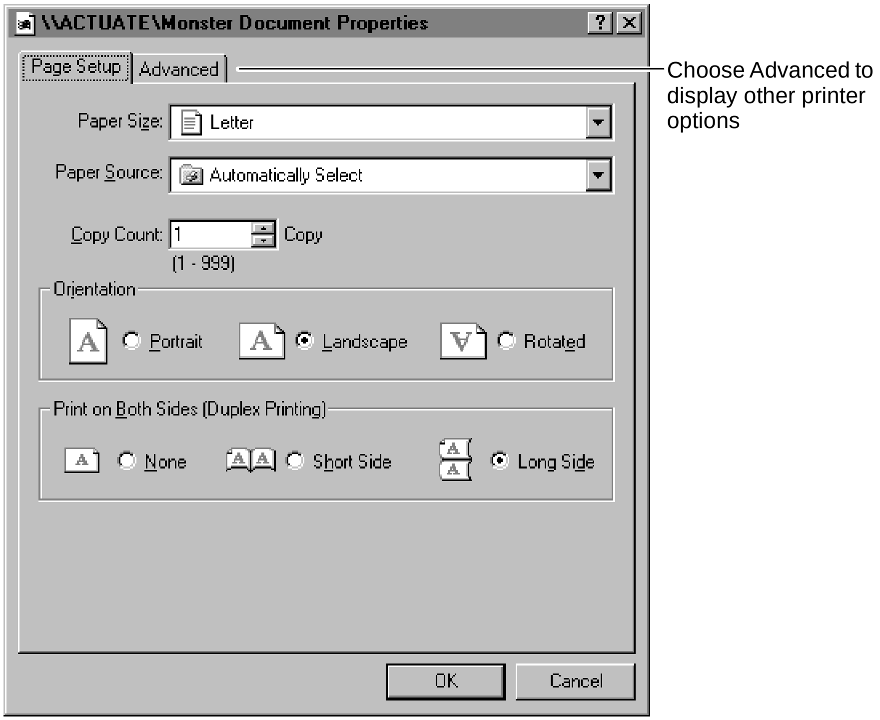
The Print dialog box appears. The options available from this dialog box let you select the printer and report printing options such as page range and number of copies.



3 Select the desired printing options, the printer, the pages to print, the order in which to print the pages, the number of copies to print.

4 To specify a printer's other properties, or to change the printer's default settings, choose Properties.

The Document Properties dialog box appears. The following illustration shows the Page Setup tab of the dialog box for an HP LaserJet 4Si MX printer driver. Options and defaults are different for different printers.

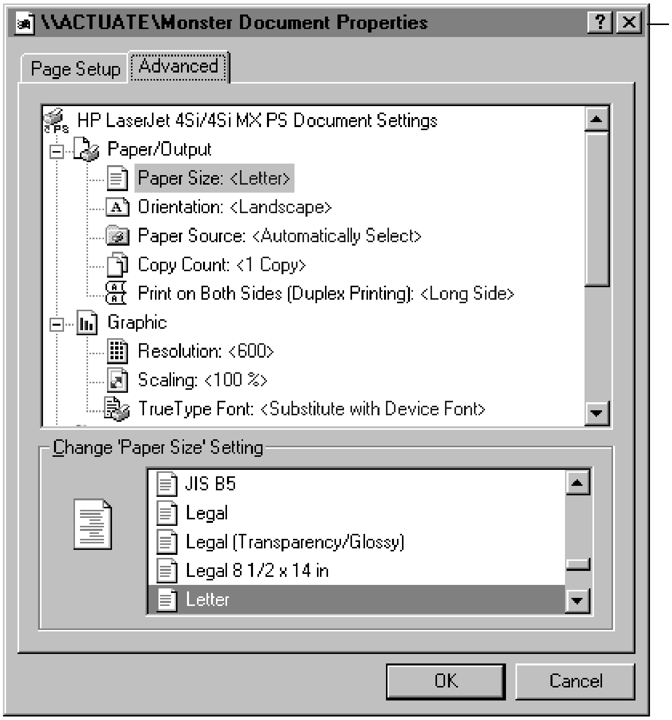


5 Set the options in this dialog box to specify paper related settings such as paper size and duplex printing.

A printed report's page orientation is determined by the layout of the report when the report is designed.

6 To view and change other printer settings, choose the Advanced tab.

The following illustration shows the Advanced properties tab for a HP LaserJet 4Si MX printer. Options and defaults are slightly different for different printers.



Use this dialog box to specify various printing options

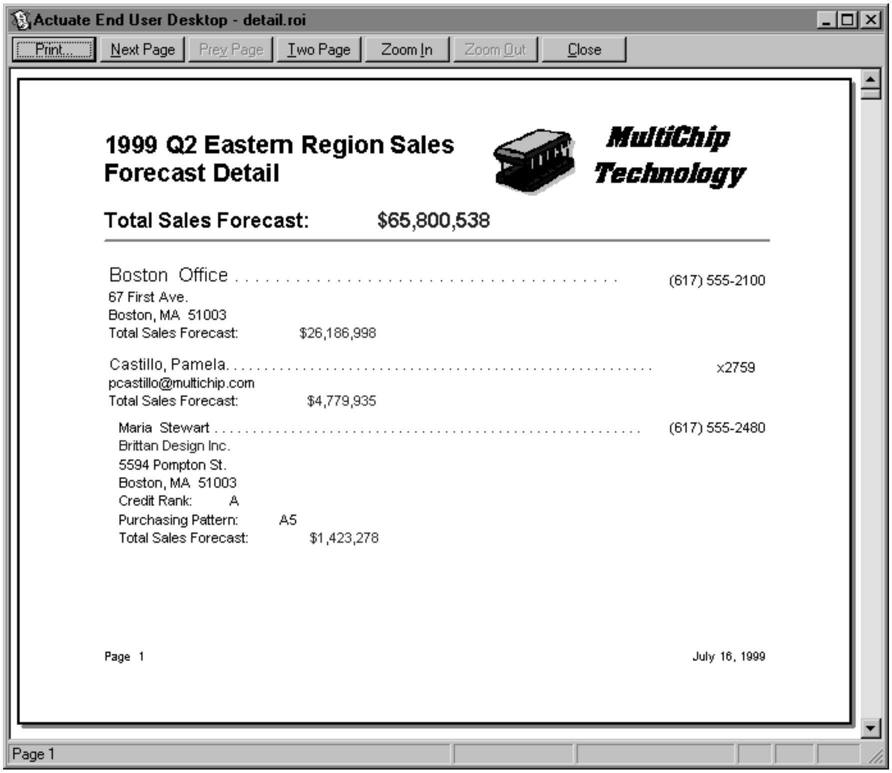
7 Set the desired printer properties, then choose OK.

8 When the Print dialog box reappears, choose OK to start printing.

How to preview a report before printing

1 Choose File→Print Preview to preview the report before printing it.

Previewing gives you an opportunity to review and change the printing options you selected.



2 Use Next Page, Prev Page, Two Page, Zoom In, and Zoom Out to see different pages and to see different levels of detail.

3 When you have finished previewing the report, choose Close to close the preview window or Print to print the report.

Command line options for printing

You can print an Actuate report document from the command line using Actuate desktop applications. With the Actuate LRX, you can use the command line only to print a report from the command line. To view a report with the Actuate LRX, open the report in your web browser. This is the command line syntax for printing reports:

```
<desktop application> -p <file>.roi [-rox <filename>.rox] -rspn<printer>[ -h]
```

The <desktop application> is the Actuate desktop application. You can use these Actuate applications, End User Desktop, Viewer, LRX, Administrator Desktop, Developer Workbench.

The -p <filename>.roi parameter is required and specifies the name of the report document. The .ROI extension is required.

The parameter -rox <filename>.rox is optional and is the name of the report executable .ROX file used with the report document. Use this parameter if the ROX name stored within the ROI is not sufficient to locate the ROX. If used, the .ROX extension is required.

The parameter -rspn <printer> is required and specifies the printer name. Use the UNC name for the printer. For example, \\myserver\printer3 is the printer named printer3 on the machine myserver.

The parameter -h is optional and enables silent (hidden) mode. If you use the -h option, the Actuate desktop application does not open a window and error messages are displayed on the command line. The LRX always uses hidden mode. If you do not use the -h option, the Actuate desktop application opens a window and the startup splash screen appears.

For example, the following command uses the Actuate Viewer to print a report that is in the c:\actuate\viewer\bin directory to a printer on the network:

```
viewer –p forecast.roi –rox forecast.rox –rspn \\actuate\printer3 -h
```

Saving reports in HTML format

To save an Actuate report document in HTML format, use a standard Windows save dialog box to specify a location and name of the HTML file. Actuate converts the report document to HTML format and attempts to preserve Actuate report document formatting by using HTML tables and text formatting.

How to save a report in HTML format

1 Open the report document (.ROI) you want to save.

2 From the report's context menu, choose Save as HTML.

The New HTML File dialog box appears. Use the items in the dialog box to navigate to a directory. Specify the file name in the File Name edit box and choose Save to save the report in HTML format.

Printing reports in a Report Encyclopedia

There are two times when you can send a report in a Report Encyclopedia to a network printer:

- When you create a report request, the Print tab in the Requester lets you specify the network printer to which a completed report is sent. For information about creating report requests, see "Creating report requests in the Report Encyclopedia" in Chapter 4, "Running a report from the desktop."
- You can print any report at any time. To do so, choose Print Report from the report's context menu.

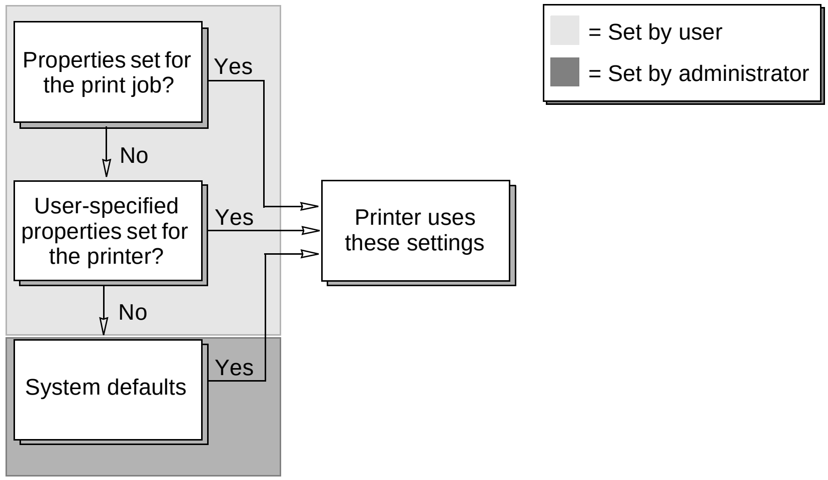
When you print a report from a UNIX report server to a UNIX printer, the printout might appear different from the displayed report or the report printed on a local Windows printer. This might be due to the UNIX printer configuration or the report server printing configuration. Contact your report server administrator if this occurs.

Setting printer properties in the Report Encyclopedia

When you print a report in the Report Encyclopedia, the network printer gets its printing options from three sources, in the following order:

1. The printer properties you set for the print job.
2. The printer properties you set as the default settings for a specific printer.
3. The printer's system level properties, set by the administrator.

The following conceptual diagram illustrates how a printer determines what printer properties to use for a print job.



As a user, you can:

- Set printer properties that are used only for the print request you are about to send.
- Set default properties for a specified printer so that the properties are retained for future use. If you have access to multiple network printers, you can set and save print properties for each printer.

If you do not specify any printer properties, the printer uses the system level defaults, which only the administrator can change. Some printer properties, such as duplexing and color, are available only if the printer supports them.

Setting default properties for a printer

If you print reports on the server frequently, it is best if you set default printer properties for each of the printers you use often. By doing so, you can print reports without having to set properties for each print request, and you will always get the same format. If your print requirements change, you can modify the default settings easily. Or, if you need a different format for one print request only, you can specify property settings that apply only to the print request.

When you set the default printer properties, they are associated with your user account. In other words, your printer settings apply only to your print requests, and do not affect the settings for other users.

How to set default properties for a printer

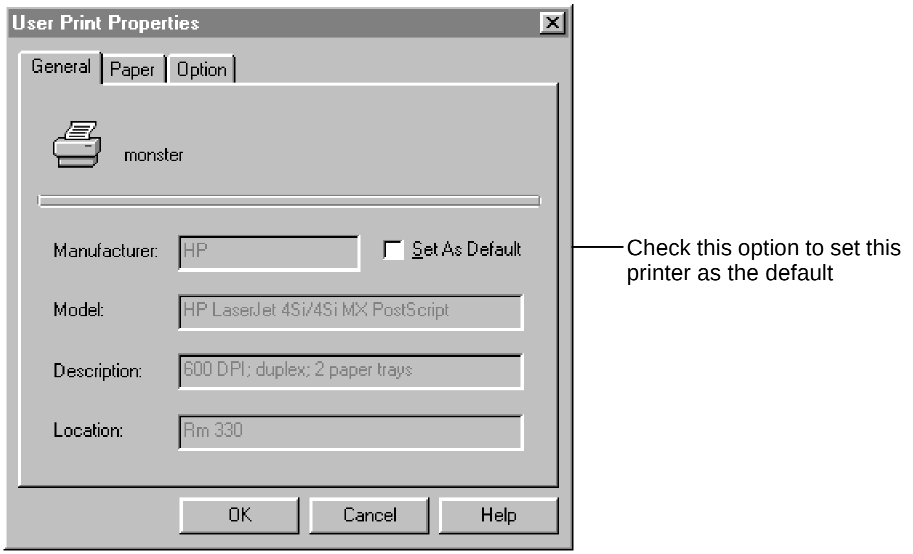
1 Choose Printers from the left pane of the Navigator window.

A list of network printers appears in the right pane of the Navigator.

2 Choose the printer whose properties you want to set.

3 Press the right mouse button and choose Properties from the context menu.

The User Print Properties dialog box appears with the General page open, as the following illustration shows. This page displays read only information, specified by the administrator, about the printer.



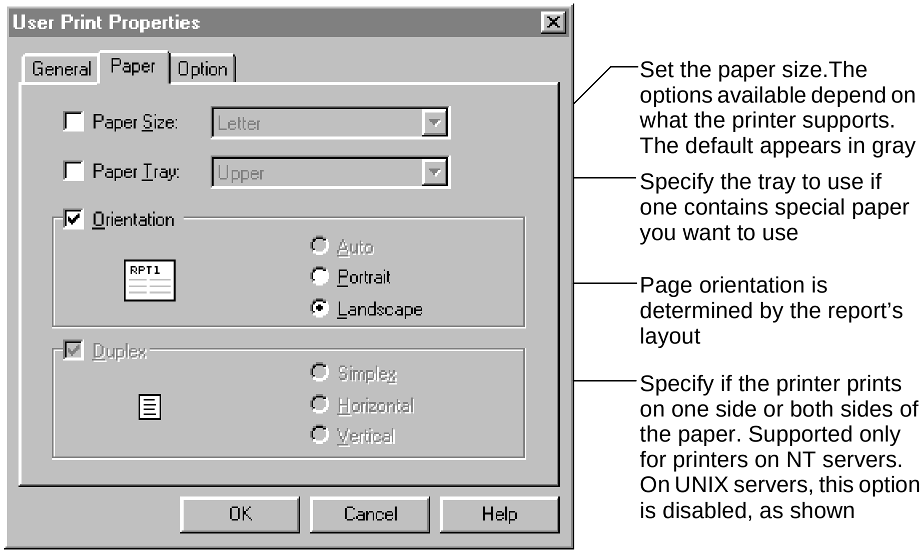
4 If you want to set this network printer as the default, check the Set As Default option.

Future print requests you submit will use the default printer unless you specify a different one at that time.

5 Choose the Paper tab to set paper properties, such as size, paper tray, and duplex mode.

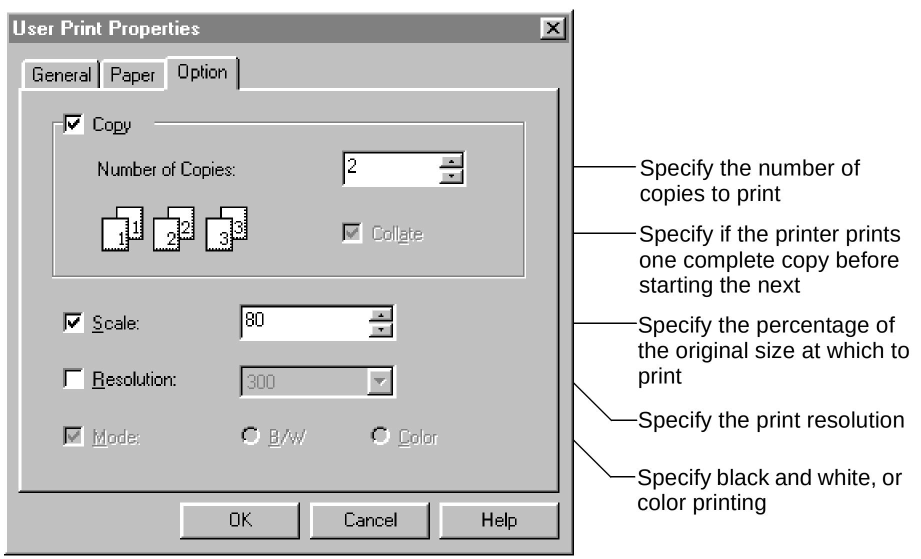
The printer's default values, set by the administrator, appear in gray. You can accept or change the defaults. If the option headings are gray, that means the option is unavailable. A printed report's page orientation is determined by the layout of the report when the report is designed.

The following illustration shows the Paper page and describes the properties.



6 Choose the Option tab to set other properties, such as number of copies, image size, and print resolution.

A printed report's page orientation is determined by the layout of the report when the report is designed.



Setting properties for a specific print request

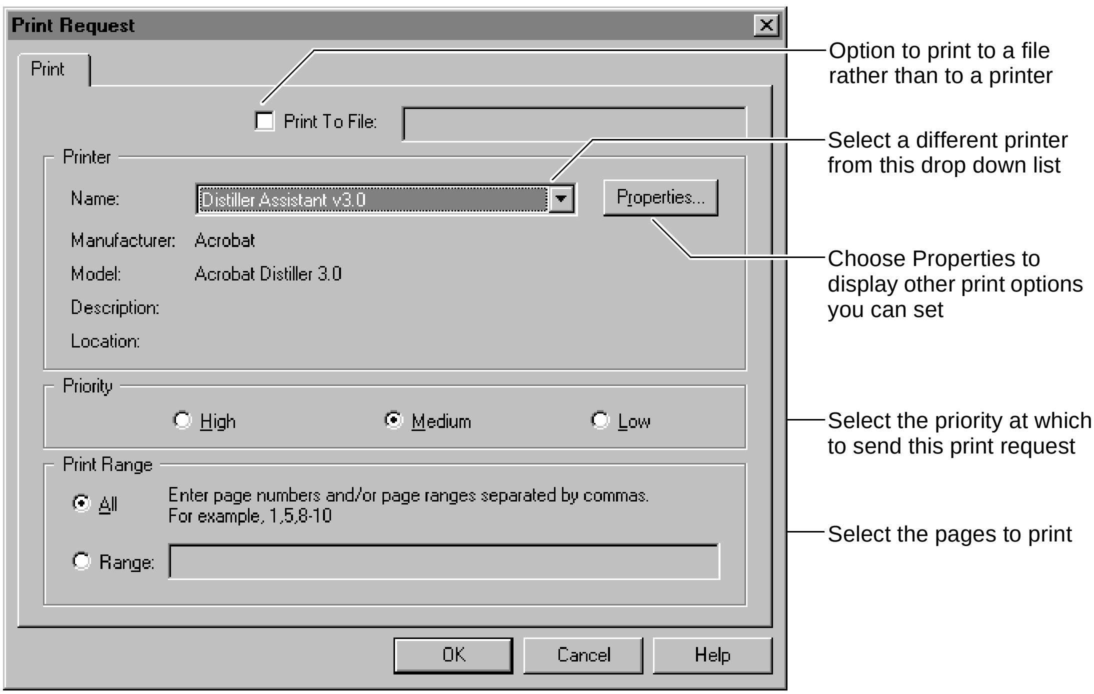
Set printer properties for a print request if your requirements are different from the defaults you set previously for a specific printer, and if you do not want to use the system level defaults established by the system administrator.

How to set properties for a specific print request

1 Select the report you want to print.

2 Press the right mouse button and choose Print Report from the context menu that appears.

The Print Request dialog box appears.



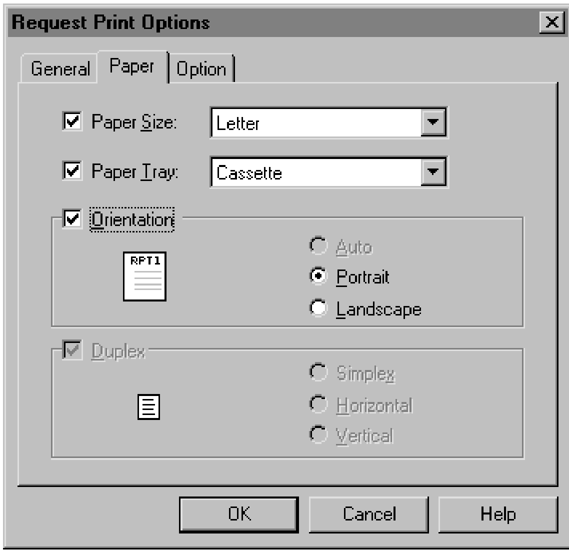
3 Select the network printer, priority, and print range.

The priority levels you can specify depend on what the administrator assigned as the maximum priority you can set for requests. If, for example, the administrator set your maximum request priority at medium, you can print reports only at the medium and low priorities.

If you select Print to file, the file will be sent to the file you specify on the report server's local file system.

4 Choose Properties to specify printing options.

The Request Print Options dialog box appears.



Use this dialog box to specify various printing options

5 Set the desired properties. For information about each property, see "How to set default properties for a printer," earlier in this chapter.

Running a report before printing

If a report object executable (.ROX) file is available, you can generate a new report to print. There are several reasons for rerunning a report just before printing:

- To include database updates made since the developer designed the report and made it available to you.
- To include database updates made since the last time you worked with the report.
- To specify parameters to generate a report that are more useful for current needs than the parameters of the original report design.

Distributing a report from your desktop

There are two ways to distribute a report from your desktop to users throughout an organization. You can:

- Send the report through e-mail or fax software.
- Copy the report to the Report Encyclopedia and inform the users of the report's location. You can use this method only if you and the recipients of the report work in a distributed reporting environment, and have access to the Report Encyclopedia.

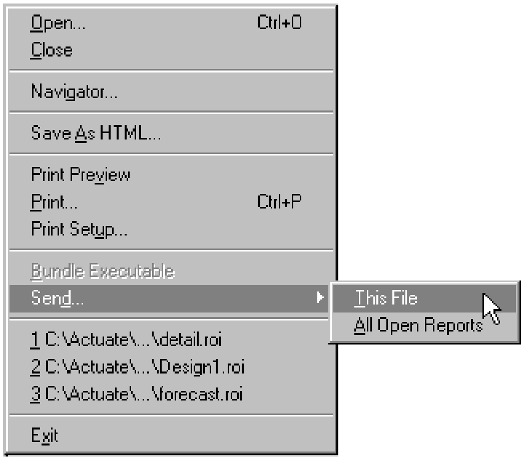
To distribute a report, you provide the appropriate report files and Actuate Viewer, if required. The Viewer is required if the recipients do not have any Actuate desktop applications, such as the Developer Workbench or the End User Desktop.

When a user opens a report for viewing or printing, Actuate runs the report executable from which the report was generated. Therefore, when you distribute a report to other users, you need to include the executable as well. To simplify the distribution process, Actuate provides the option of bundling the executable with the report so you need to send only one file.

How to distribute a report from your desktop using e-mail

1. Open the report document you want to distribute. You can use the Developer Workbench, End User Desktop, or the Administrator Desktop to open the report.
2. Choose File→Send.

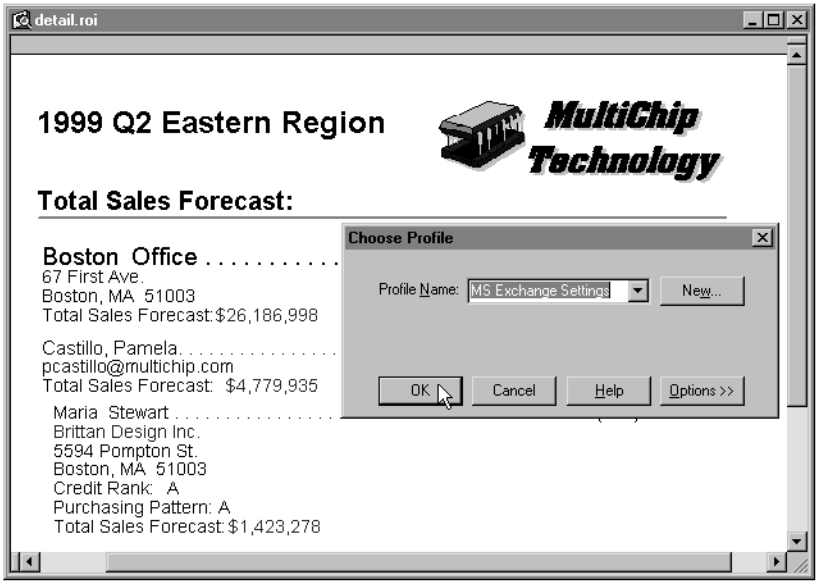
   You have the option to send just this file or all open reports.
3. Choose whether to send just the current report, or all open reports.



Actuate displays a message prompting you to bundle the executable with the report.

4 Choose Yes to start the bundling process.

The Choose Profile dialog box appears. This dialog box provides the option of distributing a report through various services. The default choice is Microsoft Exchange. You can, however, choose other mail services.



5 Choose the service to distribute the report, then choose OK.

A mail dialog box appears, prompting you to enter your mail user name and password.

6 Type the required information in the mail dialog box, then choose OK.

A mail window appears with the report as an attachment.

7 Address the mail message and send it.

The recipients will receive the report as a mail attachment.

How to distribute a report from your desktop using the Report Encyclopedia

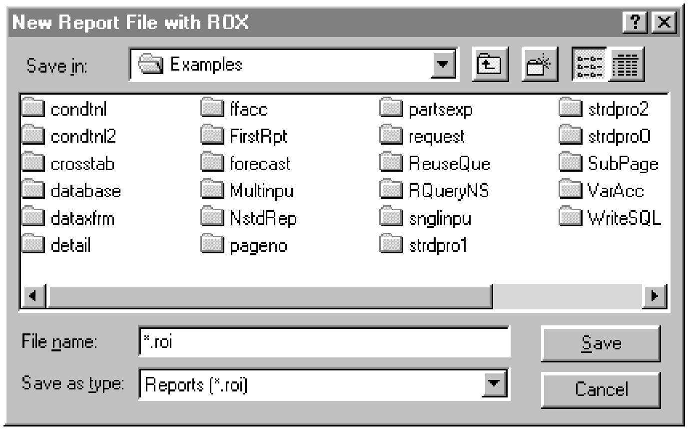
The instructions in this section assume you and the recipients have access to the Report Encyclopedia.

1 Prepare the report for distribution by performing the following steps:

  1 Open the report you want to distribute. You can use the Developer Workbench, End User Desktop, or the Administrator Desktop to open the report.

2 Choose File→Bundle Executable.

The New Report File with ROX dialog box appears.



3 Type a new file name for the report with the bundled executable.

You must specify a new name. Actuate does not allow you to overwrite the original report because it is open.

4 Select the folder in which to save the new report file.

5 Choose Save to save the new report file.

2 Log on to the Report Encyclopedia. For instructions about logging on to the Report Encyclopedia, see “Connecting to the Report Encyclopedia” in Chapter 2, “Working with the desktop Navigator.”

3 Copy the file from your local machine to the Report Encyclopedia. For instructions about copying files to the Report Encyclopedia, see “Copying files to the Report Encyclopedia” in Chapter 2, “Working with the desktop Navigator.”

4 Inform the recipients of the report’s availability and location.

How to distribute Actuate Viewer

Actuate Viewer is a royalty free tool for viewing Actuate reports. You can distribute copies of Actuate Viewer freely. Use one of the following methods to distribute Actuate Viewer:

- Download the Viewer installation file from the Actuate web site http://www.actuate.com to a location all users have access to and let the users download and install the Viewer.
- Allow users to download the Viewer installation file from the Actuate web site.

- Copy the Viewer installation files from the an Actuate CD-ROM to a location all users have access to and let the users install the Viewer. If the Actuate CD-ROM has the Viewer installation files, the files are located in the \Viewer directory. For the viewer install to work, you must copy all the files and maintain the directory structure in the \Viewer directory

Also, users can install the Actuate LRX to view Actuate reports using a web browser.

Distributing a report stored in the Report Encyclopedia

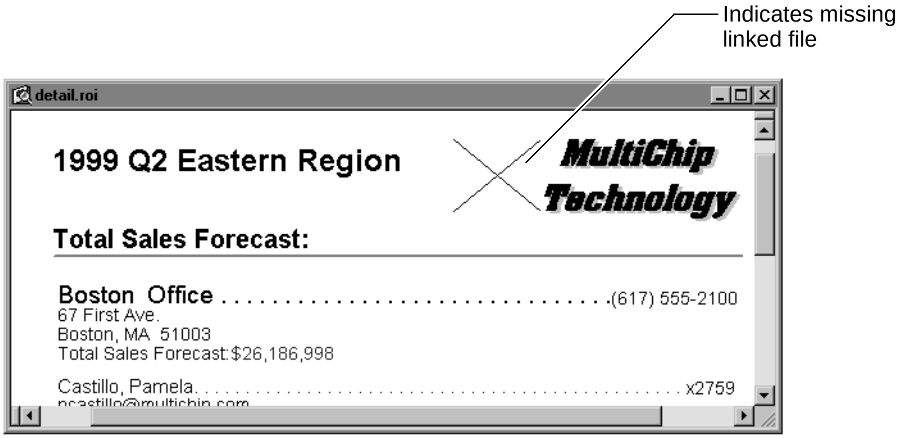
Storing files in a Report Encyclopedia makes physical distribution of files unnecessary. Users with access to the Report Encyclopedia can log on at any time and find reports for which they have been granted appropriate file privileges.

If you have been granted the privilege to run report executables (.ROXs), you can specify the users or groups to whom you want to distribute report documents. You can also specify different file privileges for different users and groups. You specify the distribution list and the file privileges as part of issuing a report request. For instructions about issuing a report request, see “Creating report requests in the Report Encyclopedia” in Chapter 4, “Running a report from the desktop.”

Linked and embedded objects in the report

Bitmaps, spreadsheets, or other files might be used by report developers as part of a report design. If these external objects are linked to the report, the distributed report searches the path to find them. If it cannot find the path, the linked object does not appear in the report.

If you see an X in your report, a necessary file might not have been included when the report was distributed. Embedded objects, on the other hand, are part of the report. If you are distributing a report you designed, it is best to embed objects in the report design. The following illustration shows a report that has lost a link to an external object.


Indicates missing linked file
detail.roi
1999 Q2 Eastern Region
MultiChip Technology
Total Sales Forecast:
Boston Office (617) 555-2100
67 First Ave.
Boston, MA 51003
Total Sales Forecast:$26,186,998
Castillo, Pamela x2759

Glossary

access control list (ACL)

A list of security IDs for a page. If a security ID in the access control list matches any user ID, the page is accessible to the owner of that user ID.
Related terms
privilege
security ID

active request

A request currently eligible for execution on a server. An active request begins to run when a Factory process becomes available.
Related terms
Factory process
server application

ActiveX See Actuate Software Development Kit (SDK).

Actuate Administrator Desktop

An application distributed as part of the Actuate e.Reporting Server used to manage user accounts, security, and report servers.

Related term
Actuate e.Reporting Server

Actuate Advanced e.Reporting Server

A set of cooperating processes that includes open server and page security options. These processes employ the Actuate Administrator Desktop to manage information and service requests from users. For example, an Actuate Advanced e.Reporting Server provides security, scheduling, report generation of Actuate and third party reports, printing, and notification. Use the Actuate

Software Development Kit to extend the Actuate Advanced e.Reporting Server functionality.

Related terms

Actuate Administrator Desktop
Actuate e.Reporting Server
Actuate Software Development Kit (SDK)
open server technology
page security
server application
server processes

Actuate Basic

A programming language that is syntax-compatible with Microsoft Visual Basic 3.0. Actuate Basic consists of standard Basic functions and statements, plus object-oriented language extensions. Report developers can write Actuate Basic code to go beyond what can be accomplished with the Actuate Developer Workbench interface.

Actuate Developer Workbench

An application used to build report designs and reusable components. Such designs can be used to distribute structured content over the World Wide Web.

Related terms

Actuate e.Report Designer
component
e.report
World Wide Web (WWW or W3)

Actuate End User Desktop

An application used to access on-demand e.reports, to schedule running of e.reports, to run, print, and view e.reports.

Related term

e.report

Actuate e.Report Designer

An application that complements the Developer Workbench and is used by business users to design and distribute a variety of reports. Such designs can be used to distribute structured content over the World Wide Web.

Related terms
Actuate Developer Workbench
e.report
World Wide Web (WWW or W3)

Actuate e.Reporting Server

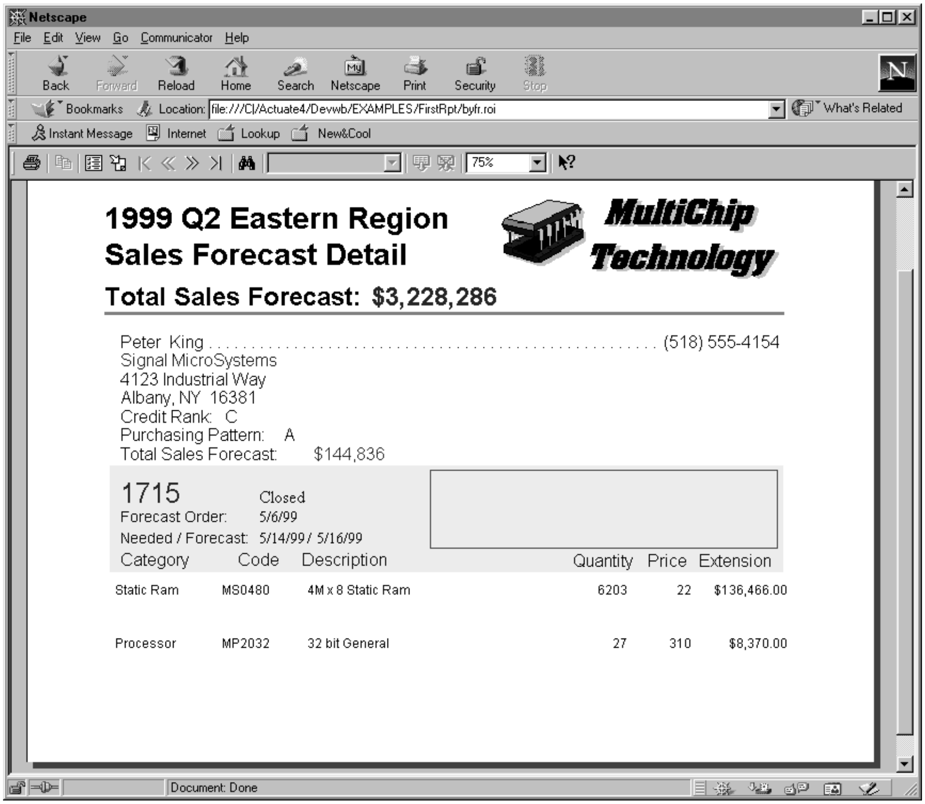
A set of cooperating processes that employ the Actuate Administrator Desktop to manage information and service requests from users. For example, an Actuate e.Reporting Server provides scheduling, report generation, printing, and notification. Use the Actuate Software Development Kit to extend the Actuate e.Reporting Server functionality.

Related terms
Actuate Administrator Desktop
Actuate Advanced e.Reporting Server
Actuate Software Development Kit (SDK)
server application
server processes

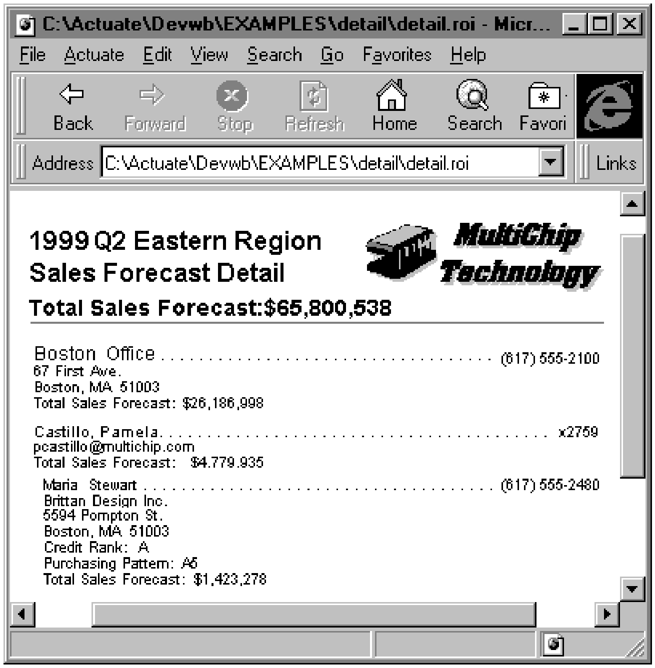
Actuate Live Report Extension (LRX)

An application used to find, view, and print e.reports accessed over the World Wide Web. The Actuate LRX runs in Internet browsers such as Netscape and Microsoft Internet Explorer. The LRX is different from the standard Actuate Viewer in that it does not contain the Navigator.

Live Report Extension (LRX) for Netscape Navigator



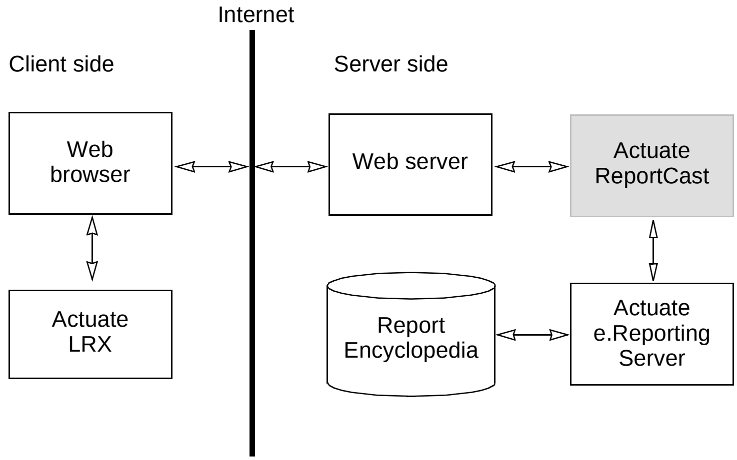
Live Report Extension (LRX) for Microsoft Internet Explorer



Related terms
Actuate Viewer
e.report
Navigator
World Wide Web (WWW or W3)

Actuate ReportCast

A web server extension that enables users of the World Wide Web to locate and access e.reports in a Report Encyclopedia on an Actuate e.Reporting Server. ReportCast generates HTML pages based on templates. ReportCast technology pushes reports to particular users.



Related terms
Actuate e.Reporting Server
Actuate ReportCast technology
hypertext markup language (HTML)
push
Report Encyclopedia
web server
World Wide Web (WWW or W3)

Actuate ReportCast technology

Application technology that delivers structured content and live e.reports to web browsers and other internet-connected applications.

Related terms
e.report
structured content
web browser

Actuate Software Development Kit (SDK)

Development tools that include:

1. Actuate ActiveX Controls embed Actuate reporting functionality into custom applications.
2. Actuate Requester API accesses attributes and values of report parameters, changes the values of report parameters, controls how and when an e.report is generated, displays and prints reports, and configures report print setup. Access the Requester API using Actuate Basic, Visual Basic, C, or C++.

3 Actuate search extension API supports developing search extensions to transfer data to any third party productivity or analysis tool.

4 Actuate report server API implements common Report Encyclopedia tasks, integrates report server features into existing corporate applications, automates routine or time-consuming tasks, and implements new feature groupings for custom business processes. Access the report server API using C++.

5 Actuate Report Server Security Extension supports the use of third party security tools.

6 Actuate archive driver supports the use of third party archiving software and hardware.

Related terms
application
e.report
parameter
Report Encyclopedia

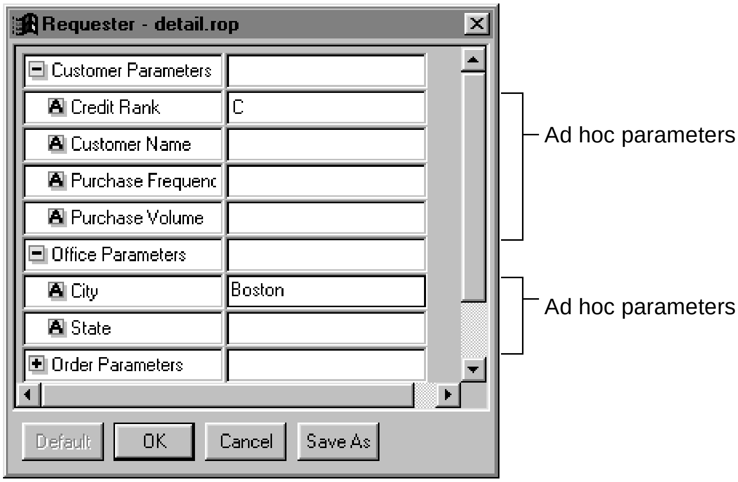
Actuate Viewer

An application used in the client/server environment to find, view, and print reports.

Related terms
e.report
client/server

ad hoc parameter

A parameter, associated with a database column, that passes an expression that dynamically extends a query's Where clause. An ad hoc parameter is an optional value that restricts the number of rows returned from the database to the e.report.



Related terms
e.report
parameter
query

Administration process

An Actuate e.Reporting Server process that validates users and user requests. The server processes are Administration, Factory, Persistent Object, Print, Request, and View.

Related terms
Actuate e.Reporting Server
password
server processes
user name

administrator

A user who manages a Report Encyclopedia and its e.Reporting Servers. The administrator has grant privileges on all Encyclopedia items and can modify report server properties.

Related terms
Actuate e.Reporting Server
grant privilege
Report Encyclopedia
role
role owner
server application

Administrator Desktop

See Actuate Administrator Desktop.

Advanced e.Reporting Server

See Actuate Advanced e.Reporting Server.

applet

A small application program that performs a simple task. Applets are often embedded objects such as a Java program that can be included in an HTML page.

Related terms

application
hypertext markup language (HTML)
Java
object

application

A collection of code and visual elements that work together to perform a task.

asterisk (*)

1 A wildcard character used for searches and queries.

2 A multiplication symbol in expressions.

Related terms

search expression
wildcard

auto-archive

A file management capability that supports archiving and deletion of e.report files based on the age of the file, a specific date, or the number of versions.

Related term

e.report

base graph

The part of a dual y-axis graph whose y-axis is on the left.

Related term

graph

Contrast with

overlay graph

Basic source (.BAS) file

A file that contains Actuate Basic source code. A Basic source file can be created in two ways:

1 The user writes a Basic source file using any text editor and saves it to a .BAS file.

2 The user compiles a report design (.ROD), which causes Actuate to generate a Basic source (.BAS) file. The source file or files are then compiled into an executable (.ROX) file.

Related terms

Actuate Basic
report object design (.ROD) file
report object executable (.ROX) file
report object instance (.ROI) file

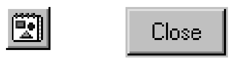
report object library (.ROL) file
report object value (.ROV) file
report object web (.ROW) file
search definition (.ROS) file

browser A tool used to search for information such as design elements, e.reports, and resources.

Related term
web browser

bursting See report bursting.

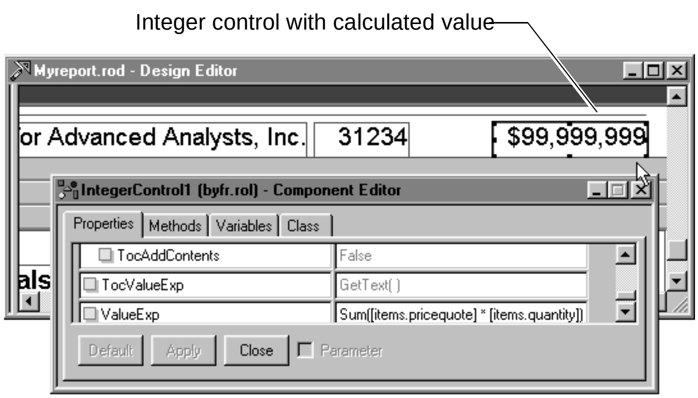
button An icon in a toolbar, tool palette, or dialog box that provides quick access to a feature or function.



Related term
toolbar

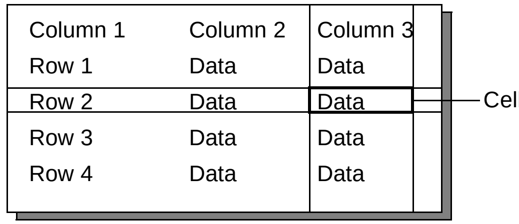
calculated control

A data control that displays the result of an expression rather than stored data. Actuate recalculates the result each time it generates the report.



caption The text on a label or in the title bar of a report window.

cell An intersection of row and column in a crosstab or grid.



Related terms
column
row

channel

A set of pages, news headlines, and other information that a publisher packages and transmits to subscribers.
Related terms
Actuate ReportCast technology
publish and subscribe
subscribe
Contrast with
unsubscribe

channel page

A HyperText Markup Language page that displays the contents of a specific channel.
Related terms
Actuate ReportCast technology
channel
hypertext markup language (HTML)
page

channel subscription page

A page that displays the set of channels to which a user can subscribe and the user's subscription status.
Related terms
Actuate ReportCast technology
channel
channel page
subscribe

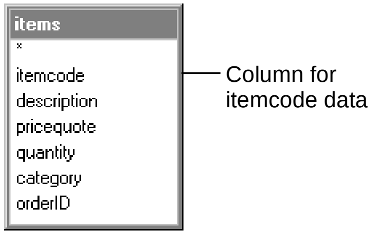
client/server

A relationship in which server software accepts requests from client software and returns the results to the client. Typically, the client and server software are located on different machines and communicate over a network.

Clipboard

A temporary storage area used by Windows that holds graphics or text to transfer from one document to another.

column A named field in a database table or query. For each row, the column has a different value, called the column value. The term *column* refers to the definition of the column, not to any particular value.



Related terms
field
query
row
table

command

1. A user-initiated action request that takes the form of a name and parameters that can be performed by an application.
2. In Actuate ReportCast, commands are part of the scripting language included with the Actuate ReportCast. These commands are embedded in the HTML comments of the Actuate ReportCast template file. The command tells ReportCast how to generate a web page. Scripting language commands use this format:

   <!- - #Actuate <directive> [options] - ->

   For example:

   <!- - #Actuate list members (roles) - ->

Related terms
Actuate ReportCast
hypertext markup language (HTML)
parameter
template
web page

component A building block used to construct a report design.

connection A communication link with a database or other data source.

context menu

A menu accessed using the right mouse button. The context menu contains commonly used commands associated with a particular item such as a component.

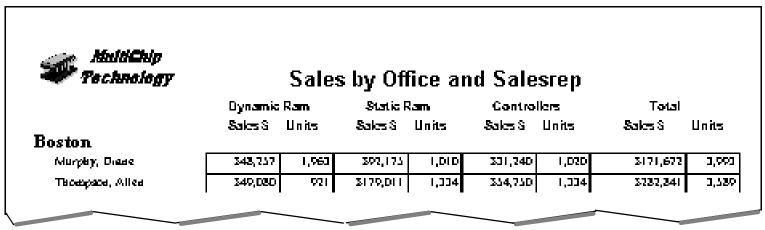
Related terms
command
component

copy

A technique that duplicates all currently selected data or objects and places that material temporarily on the Clipboard.
Related terms
Clipboard
data

crosstab report

An e.report that displays data in spreadsheet format using fields specified as rows and columns.



cue card

An online window that contains a step-by-step procedure to help accomplish an unfamiliar task quickly. The title of each cue card begins “How to...” The procedures are identical to those in the printed manual, so there is no need to cross-check for additional or different information.
Related term
online help

cut

A technique that removes all currently selected data or objects and places that material temporarily on the Clipboard.
Related terms
Clipboard

data

Information stored in databases, spreadsheets, or documents that can be displayed in an Actuate structured document or e.report. The information can be text, numbers, or graphics.
Related terms
data source
e.report
structured content

data source

A repository of data such as a structured document, a flat file, an object database, a spreadsheet, a SQL database, or any other pool of information. An Actuate e.report can include all these types of data.
Related terms
component
data
e.report
structured content

database connection

See connection.

database management system (DBMS)

Software that helps you organize simultaneous access to shared data. Database management programs store relationships among various data elements.

Related term

data

DBMS (database management system)

See database management system (DBMS).

default

A value that is automatically assigned by the application when the user does not specify a value.

delete privilege

A privilege that provides the option to remove items from the Report Encyclopedia. Other privileges include execute, grant, read, secure read, visible, and write.

Related terms

execute privilege
grant privilege
privilege
read privilege
Report Encyclopedia
secure read privilege
visible privilege
write privilege

demand paging

A mechanism for dealing efficiently with large files. Instead of reading an entire file into memory or sending an entire file over a network, pages are sent as needed. This method of data transfer improves response time and optimizes resource usage.

Related term

Virtual Report Distribution

dependency

A relationship between two items. For example, a dependency exists between a specific report executable (.ROX) and a report document (.ROI). That means the report document does not run unless the report executable is present.

Related terms

report object instance (.ROI) file
report object executable (.ROX) file

Developer Workbench

See Actuate Developer Workbench.

DHTML (dynamic hypertext markup language)

See dynamic hypertext markup language (DHTML).

directive

See ReportCast directive.

DLL (dynamic-link library)

See dynamic-link library (DLL).

document object model (DOM)

A model that defines the structure of a document such as an HTML or XML document. The document object model defines interfaces that dynamically create, access, and manipulate the internal structure of the document.

Related terms

extensible markup language (XML)
hypertext markup language (HTML)
structured content

document type definition (DTD)

A set of markup tags and their interpretation that together define the structure of a document.

Related terms

extensible markup language (XML)
structured content

domain name

A name that defines individual Internet computers. For example, Actuate Corporation's domain name is Actuate. The Web address is www.actuate.com.

Related term

Internet

drag-and-drop

A Windows technique that requires clicking the mouse button while the pointer is over an object you wish to select and move. Hold the mouse button down to drag the object over the destination. Release the mouse button to drop the object at the destination. The operation that is performed by this action, such as copy, move, subclass, or publish, depends on the component you select and the place where you drop it.

Related term

publish and subscribe

driver program

An interface between the Actuate e.Reporting Server and a third-party program.

Related term
Actuate e.Reporting Server

DTD (document type definition)

See document type definition (DTD).

dual y-axis graph

A type of graph that has two independent y-axes.
Related terms
base graph
graph
overlay graph

dynamic hypertext markup language (DHTML)

An HTML extension that provides greater control over page layout elements. DHTML provides interactivity in a web page without the necessity for communication with a web server. The Document Object Model Group of the W3C is developing DHTML standards.
Related terms
hypertext markup language (HTML)
World Wide Web Consortium (W3C)

dynamic-link library (DLL)

A library of routines loaded and linked into applications at run time. Such routines may provide such functions as data source Application Programming Interfaces (APIs), specialized mathematical or statistical analysis, and audio or video processing. These routines can be called from Actuate Basic.
Related term
Actuate Basic

embed

To insert a copy of an OLE object from one application inside another. Once embedded, the object has no association with the original source object.
Related terms
link
object
OLE (object linking and embedding)

Encyclopedia

See Report Encyclopedia.

End User Desktop

See Actuate End User Desktop.

enterprise

A large collection of networked computers running on multiple platforms. Enterprise systems can include both mainframes and workstations integrated into a single manageable environment. Software products include browsers, applications, applets, Web protocols, and multiple databases supporting a warehouse of information.

Related terms

application
browser
enterprise reporting

enterprise reporting

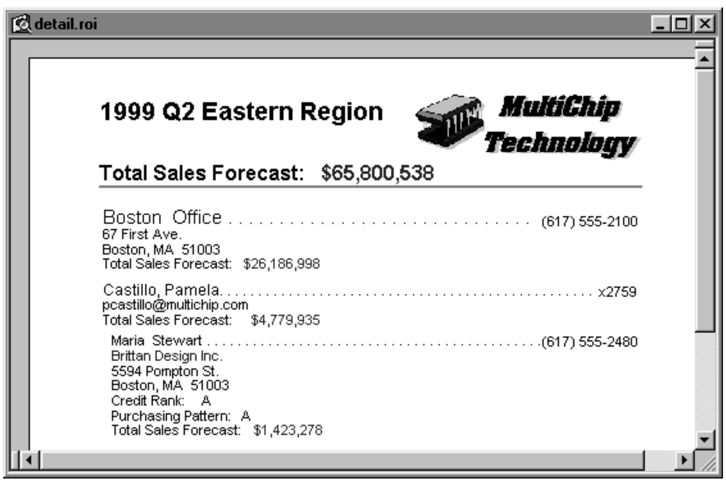
The production of a high volume of simple and complex structured documents that collect data from a variety of data sources. These e.reports are deployed to a large number of geographically distributed users working in both client/server and Internet environments.

Related terms

client/server
data
e.report
enterprise
Internet
structured content

e.report

A structured document that follows a set of rules to organize, summarize, and present data from many records.



Related terms

structured content
XML report

e.reporting

A technology that draws data from multiple data sources such as spreadsheets and databases and presents it as structured content for viewing in a web browser.

Related terms
data
data source
structured content
web browser

e.Reporting Server

See Actuate e.Reporting Server.

escape character(\)

A character provided to take care of cases where special characters are to be taken literally rather than treated specially. This character is valid only in Query by Example (QBE) expressions.
Related term
Query by Example (QBE)

executable file

A file that contains machine-readable instructions that, when run, perform one or more tasks. Actuate report executables have .ROX filename extensions.
Related term
report object executable (.ROX) file

execute privilege

A privilege that provides the option to run items from the Report Encyclopedia. Other privileges include delete, grant, read, secure read, visible, and write.
Related terms
delete privilege
grant privilege
privilege
read privilege
Report Encyclopedia
secure read privilege
visible privilege
write privilege

expiration

An Actuate ReportCast channel property that specifies how long an e.report and its headline appear as a selection.
Related terms
Actuate ReportCast technology
channel
e.report

extensible markup language (XML)

A markup design language or a meta-language from which markup languages can be derived. XML is a simplified form or subset of SGML developed specifically for use on the World Wide Web. XML organizes data into a strictly defined hierarchy that facilitates data exchange. XML is content-oriented rather than format-oriented.

Related terms

data
standard generalized markup language (SGML)
World Wide Web (WWW or W3)

Contrast with

hypertext markup language (HTML)

Factory

An internal tool that generates an e.report for viewing. The Factory follows the instructions in a report executable (.ROX) file to generate a report (.ROI).

Related terms

e.report
report object executable (.ROX) file
report object instance (.ROI) file
view

Factory process

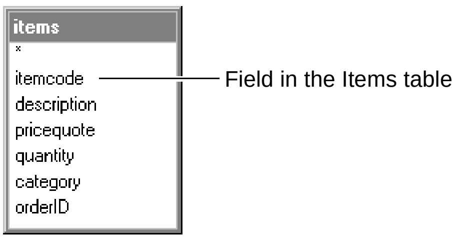
An Actuate e.Reporting Server process that generates a report instance file (.ROI) from a report executable file(.ROX) and issues notification of the completion of the e.report. The server processes are Administration, Factory, Persistent Object, Print, Request, and View.

Related terms

e.report
notification
report object executable (.ROX) file
report object instance (.ROI) file
server processes

field

The smallest identifiable part of a table structure. A field is also called a column.



Related term

column

file dependency

A file property that means one file depends upon another file for its existence. For example, the Actuate e.Reporting Server automatically creates a dependency between a report document (.ROI file) and the report object executable (.ROX file). Both files must be present to run and view an e.report.

Related terms

Actuate e.Reporting Server
e.report
report object instance (.ROI) file
report object executable (.ROX) file

file types

See Basic source (.BAS) file, report object design (.ROD) file, report object executable (.ROX) file, report object instance (.ROI) file, report object library (.ROL) file, report object value (.ROV) file, report object web (.ROW) file, search definition (.ROS) file.

font

A family of characters of a given style. Fonts contain information specifying typeface, weight, posture, and type size.

forms-capable browser

A browser that handles HyperText Markup Language (HTML) forms. HTML tags enable interactive forms including fill-in text areas, option buttons, drop-down list boxes, and check boxes.

Related terms

browser
hypertext markup language (HTML)

frame

An HTML frame is an independently scrollable section of a window that divides a web page into horizontal and vertical sections. Template files make use of HTML frames and tables.

Related terms

Actuate ReportCast
ReportCast template file

grant privilege

A privilege that provides the option to extend privileges for a specific item in the Report Encyclopedia to other users. The user who develops a particular item and places it in the Report Encyclopedia and the administrator both have grant privileges for that item. Other privileges include delete, execute, read, secure read, visible, and write.

Related terms

delete privilege
execute privilege
privilege
read privilege
Report Encyclopedia

secure read privilege
visible privilege
write privilege

graph A component used to create or display information visually in an e.report. Actuate provides a set of standard business graphs such as pie charts, bar graphs, and scatter graphs. The relevant Actuate Foundation Class is AcGraph.

Related terms
component
e.report

group

1 A set of data rows that have one or more column values in common. For example, in a sales report, a group consists of all the orders placed by the same customer.

2 A notification list. All users can use any notification list, but only the administrator can modify or create a list.

Related terms
administrator
column
group owner
notification

group owner

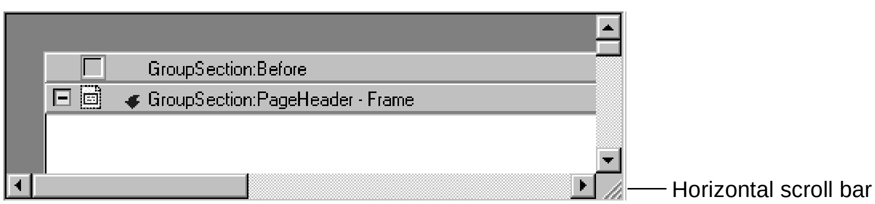
A user who controls the membership of a group.

Related term
group

help See online help.

horizontal scroll bar

A scroll bar at the bottom of the window used to move the screen view to the left and right to access information formats wider than the existing document screen settings permit.



Contrast with
vertical scroll bar

HTML See hypertext markup language (HTML).

HTTP See HyperText Transfer Protocol (HTTP).

hyperlink

1 A programmed connection from one part of an e.report to another part of the same or different e.report. Typically, hyperlinks let the user access related information within the same report, in another report, or in another application. A hyperlink is indicated by a change in the cursor shape to a hand.

2 A jump to another location on the same or a different web page.

Related term

link

hypertext markup language (HTML)

A set of conventions that determine the format of a section of a document. HTML is the markup language that tells a parser that the text is a certain portion, for example, the title, heading, or body text, of a document on the World Wide Web. The parser programs that access these documents are called web browsers.

Related terms

web browser
World Wide Web (WWW or W3)

HyperText Markup Language Page

A page containing tags that a web browser interprets and displays. This page can also be called a web page.

Related terms

Actuate ReportCast technology
page
web browser

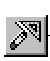
HyperText Transfer Protocol (HTTP)

An Internet standard that supports the exchange of information using the World Wide Web. HTTP enables the embedding of hyperlinks from one part of a web document to another part of the same document or a different document.

Related terms

Internet
World Wide Web (WWW or W3)

icon An image representing a specific component, executable file, or task.


Design Editor icon

Related term
component
executable file

Internet A system of linked networks that provides services such as remote login, file transfer, electronic mail, and newsgroups. The Internet enables existing computer networks to extend their reach and connectivity. The Actuate LRX (Live Report Extension) and the Actuate ReportCast are tools that take advantage of Internet capabilities to provide access to reports distributed over the World Wide Web.
Related terms
Actuate Live Report Extension (LRX)
Actuate ReportCast
web server
World Wide Web (WWW or W3)

Internet Explorer

See Microsoft Internet Explorer.

IP address The unique 32-bit ID of a node on a TCP/IP network. At login, an Actuate report server accepts an IP address.

Java A programming language designed for writing client/server and networked applications, particularly for delivery on the World Wide Web. Java can be used to write applets that animate web pages or to create interactive web sites.
Related terms
applet
application
client/server
World Wide Web (WWW or W3)

link A connection between an OLE object and its object application.
Related terms
hyperlink
OLE (object linking and embedding)

Live Report Extension (LRX)

See Actuate Live Report Extension (LRX).

LRX See Actuate Live Report Extension (LRX).

menu bar A horizontal bar below the title bar that contains menu names.

Microsoft Internet Explorer

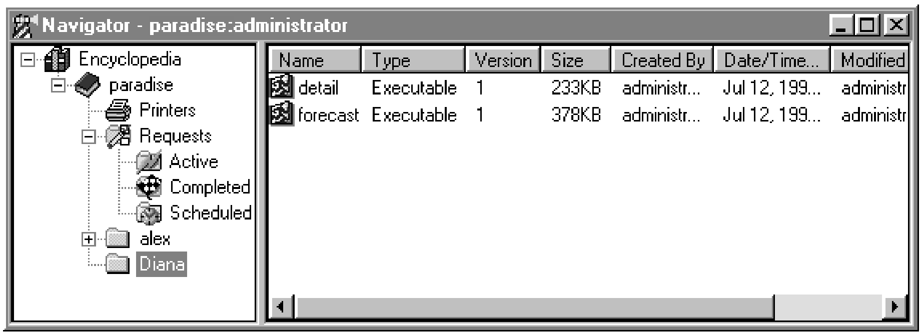
A web browser that offers support for advanced web sites including those that use animation, forms, and flashing text.
Related term
web browser

Navigation bar

See table of contents.

Navigator

A tool that provides access to the Actuate Report Encyclopedia available as part of the Actuate e.Reporting Suite. Use the Navigator to read completed reports, request reports, and schedule report requests. Access to items in the Report Encyclopedia depends upon user privileges.



Related terms
Actuate e.Reporting Server
e.report
Report Encyclopedia

Netscape Navigator

A web browser that offers support for advanced web sites including those that use animation, forms, and flashing text.
Related term
web browser

notification

1. A message sent by e-mail or presented by the Navigator in the Completed folder advising that a requested report has been run and is available for viewing. The message is a transient object.
2. A message from the e.Reporting Server software to the client software regarding the completion of a request, failure of a request, or an error that has occurred.

Related terms
Actuate e.Reporting Server
client/server
Navigator

object
request

notification group

A set of users who are informed of a completed request and available e.report.
Related terms
e.report
request

object

One of many items that make up a finished e.report. For example, each image, text control, and number in a report is an object.
Related term
e.report

object aging

See auto-archive.

OLE (object linking and embedding)

A Windows technology used to provide a document-centered rather than a program-centered environment. OLE provides a framework within which users can prepare and maintain compound documents.
Related term
OLE automation

OLE automation

A Windows technique that enables a client application to control an OLE server without direct input from the user. For use by the client, the OLE server must provide a defined interface to its functions.
Related terms
client/server
OLE (object linking and embedding)

online help

1 Information displayed on the computer screen to help the user understand an application.

2 In an Actuate report, an explanation associated with an object. The user displays online help when viewing the e.report to find out more about a particular object in the report. For example, a calculated control might have associated online help that explains how the calculation was performed.

Related terms
application
calculated control
e.report
object

open server driver

An interface between an Actuate e.Reporting Server and an external application.

Related terms

Actuate e.Reporting Server
driver program

open server technology

A technology that enables Actuate e.Reporting Server to manage and run non-Actuate reports.

Related term

Actuate e.Reporting Server

operations process

An e.Reporting Server process that executes a request to print or run an e.report.

Related terms

Actuate e.Reporting Server
e.report
Factory process
Print process
request

output format

A format to which Actuate reports can be exported. Output formats include BrioQuery, comma-delimited text, CorVu, Microsoft Excel, PDF, and XML.

Related term

extensible markup language (XML)

overlay graph

The part of a dual y-axis graph whose y-axis is on the right.

Related term

graph

Contrast with

base graph

page

A collection of HTML information that displays in a web browser.

Related terms

hypertext markup language (HTML)
web browser

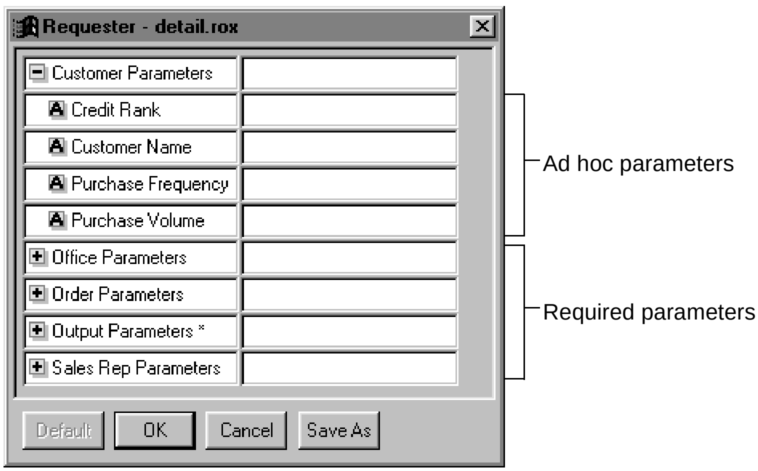
page security

A technology that controls access to structured content available on the World Wide Web. Access privileges are based on user name or role. Page security is a capability of the Advanced e.Reporting Server only.

Related terms
access control list (ACL)
Actuate Advanced e.Reporting Server
role
structured content
World Wide Web (WWW or W3)

parameter

In an Actuate e.report, a variable containing a value. Parameters provide an opportunity for the user to type a value as input to the execution of a report. Parameters provide control over report data selection, processing, and formatting.



Related terms
ad hoc parameter
e.report

password

An optional code that restricts user name access to the Report Encyclopedia. Passwords can be up to 256 characters in length and can contain any ASCII characters except control characters or spaces. Passwords are case-sensitive. Passwords can use a mixture of case, alphabetical, and numerical characters to increase security.

Related terms
Report Encyclopedia
user name

paste

A technique that moves material temporarily located on the Clipboard into a document.

Related term
Clipboard

pattern matching

See search expression.

persistent object

An object created by a client or server process and permanently stored in a file. Most objects, including data controls, graphical elements, pages, and sections, are persistent. A report object instance (.ROI) file contains only persistent objects.

Related terms

object
Persistent Object process
report object instance (.ROI) file

Persistent Object process

An Actuate e.Reporting Server process that manages an object that exists until the report file is deleted. The server processes are Administration, Factory, Persistent Object, Print, Request, and View.

Related terms

Actuate e.Reporting Server
persistent object
server processes

personal channel

A ReportCast channel page that displays the user's completed requests folder.

Related terms

Actuate ReportCast technology
channel page
Requests folder

personal folder

A user's working environment in the Report Encyclopedia.

Related term

Report Encyclopedia

plug-in

A software program that extends the capabilities of an Internet browser. For example, a plug-in gives you the ability to play audio samples or video movies.

Related terms

browser
Internet

pop-up menu

See context menu.

Print process

An Actuate e.Reporting Server process that executes a request for a printed copy of an e.report. The server processes are Administration, Factory, Persistent Object, Print, Request, and View.

Related terms

Actuate e.Reporting Server
e.report
request
server processes

printer attributes

A list of properties that describes the fixed characteristics of a printer. These properties can limit report design features.

Related term

e.report

privilege

A level of control over an item in the Report Encyclopedia. Privileges are granted to users either directly or through roles. The privileges include the ability to delete, execute, grant, read, secure read, visible, and write. The user who develops a particular item and places it in the Report Encyclopedia and the administrator both have all privileges for that item.

Related terms

delete privilege
execute privilege
grant privilege
read privilege
Report Encyclopedia
role
secure read privilege
visible privilege
write privilege

publish and subscribe

A method of communication between applications by which one application subscribes to another. The second application publishes to the first application. The publish operation occurs without a request from the first application.

Related terms

application
subscribe

push

A distribution mechanism that delivers information on preselected topics or categories to a World Wide Web user. Notifications about newly generated e.reports are automatically pushed to specific channels using Actuate's ReportCast technology

Related terms

Actuate ReportCast technology

channel
e.report
World Wide Web (WWW or W3)

query A SQL SELECT statement that specifies which rows to retrieve from the database.

Related terms
row
SQL SELECT statement

Query by Example (QBE)

A syntax for writing expressions that specify data to be retrieved from the database. Actuate modifies a query by writing SQL code based on the QBE expression.

Related term
data

query data stream

A data stream that obtains data from a relational database using a SQL query.

Related terms
data
query

query parameter

See parameter.

range The distance between the start and end value of the x-axis in a time series graph. The range is specified by the Range and RangeUnit properties.

Related terms
graph
tick interval
time series graph

read privilege

A privilege that provides the option to open, work with, and print an item in the Report Encyclopedia. Other privileges include delete, execute, grant, secure read, visible, and write.

Related terms
delete privilege
execute privilege
grant privilege
privilege
Report Encyclopedia
secure read privilege
visible privilege

write privilege

report See e.report

report bursting

A report design technique used to break a large report into several small reports. Using this technique, the single report object executable (.ROX) file generates multiple report object instance (.ROI) files.

Related terms

Report Object
report object executable (.ROX) file
report object instance (.ROI) file

ReportCast See Actuate ReportCast or Actuate ReportCast technology.

ReportCast directive

A request that triggers the use of a particular template. Directives include requests to run an e.report, view a report, or subscribe to a ReportCast channel. For example:

```
http://<webserver>/acweb/<reportserver>/<folder>/?sort=name
```

displays the contents of the specified folder sorted by owner name.

Related terms

Actuate ReportCast technology
channel
e.report
request
template
Uniform Resource Locator (URL)

ReportCast template file

A file used by Actuate ReportCast to control the appearance of generated web pages. A set of default template files installs with Actuate ReportCast. Users can also create their own templates. Actuate ReportCast locates HTML template files by looking up the values of predefined variables in the operating system environment. Actuate template files have the extension ACHTML.

Related terms

Actuate ReportCast
hypertext markup language (HTML)
template

Report Encyclopedia

A shared repository for all information related to the reporting environment. The Report Encyclopedia contains an administrative directory, a requests and scheduling directory, and a report items directory. The administrative

directory includes users, roles, and privileges. The report items directory includes designs, executables, instances, parameters, files, and libraries.
Related term
Actuate e.Reporting Server

Report Object

A structured document called an e.report that is composed of persistent objects that are active and intelligent.
Related term
e.report

report object design (.ROD) file

A file that contains a report design. A design file is created when the user saves a report design.
Related terms
Basic source (.BAS) file
report object executable (.ROX) file
report object instance (.ROI) file
report object library (.ROL) file
report object value (.ROV) file
report object web (.ROW) file
search definition (.ROS) file

report object executable (.ROX) file

A file that contains the instructions for generating and viewing a report object.
Related terms
Basic source (.BAS) file
e.report
report object design (.ROD) file
report object instance (.ROI) file
report object library (.ROL) file
report object value (.ROV) file
report object web (.ROW) file
search definition (.ROS) file

report object instance (.ROI) file

A file that contains the viewable report.
Related terms
Basic source (.BAS) file
e.report
Report Object
report object design (.ROD) file
report object executable (.ROX) file
report object library (.ROL) file

report object value (.ROV) file
report object web (.ROW) file
search definition (.ROS) file

report object library (.ROL) file

A file that contains published components. A library file is created using the New dialog box in the Developer Workbench.

Related terms
Basic source (.BAS) file
component
e.report
report object design (.ROD) file
report object executable (.ROX) file
report object instance (.ROI) file
report object value (.ROV) file
report object web (.ROW) file
search definition (.ROS) file

report object parameter (.ROP) file

A file that contains a list of report parameters used by an open server report.

Related term
open server technology

report object value (.ROV) file

A file that contains parameter values that the Factory uses to generate the e.report. A parameter values file is automatically created when users run the report.**Related terms**
Basic source (.BAS) file
e.report
Factory
parameter
report object design (.ROD) file
report object executable (.ROX) file
report object instance (.ROI) file
report object library (.ROL) file
report object web (.ROW) file
Requester
search definition (.ROS) file

report object web (.ROW) file

A structured storage file that contains bitmap, graphics, HTML information, and other information needed for an e.report. Report object web files are created by the e.Reporting Server and can be used only in the Report Encyclopedia.

Related terms
Actuate e.Reporting Server
Basic source (.BAS) file
e.report
hypertext markup language (HTML)
Report Encyclopedia
report object design (.ROD) file
report object executable (.ROX) file
report object instance (.ROI) file
report object library (.ROL) file
search definition (.ROS) file

report output

See output format.

ReportQuery

See search definition (.ROS) file and search extension.

ReportQuery extension

See search extension.

report server

See Actuate e.Reporting Server.

report server API

See Actuate Software Development Kit (SDK).

Report Server Security Extension (RSSE)

An Advanced e.Reporting Server capability that adds security IDs to a Report Encyclopedia user's access control list (ACL). The Report Server Security Extension is only used with reports that contain page security.

Related terms
access control list (ACL)
Actuate Advanced e.Reporting Server
page security
Report Encyclopedia
security ID

request

An instruction to generate an e.report. The status of a request can be active, scheduled, or completed. A request requires sending an HTTP URL from the web browser. These requests typically have a format such as:

```
http://<webserver>/acweb/<reportserver>/path?command
```

A request for all reports for a particular individual would be:

```
http://<webserver>/acweb/<reportserver>/<folder>/?name
```

Related terms
e.report
HyperText Transfer Protocol (HTTP)
url request
web browser

Request process

An Actuate e.Reporting Server process that receives, prioritizes, and acts upon incoming requests from clients. The server processes are Administration, Factory, Persistent Object, Print, Request, and View.

Related terms
Actuate e.Reporting Server
request
server processes

Requester

A mechanism in the client software used to provide or modify input parameters. The Factory uses those parameters while generating e.reports. If the client is connected to a report server, additional functions are available. The Requester is then a tabbed dialog that includes parameters, values, schedule, distribution, notification, and print tabs.

Related terms
e.report
Factory
notification
parameter

Requester API

See Actuate Software Development Kit (SDK).

request retry

A report server option that automatically resubmits a failed request.

Related term
request

Requests folder

A folder that includes active, scheduled, and completed requests for reports. In the completed requests folder, you can see your own requests and any other completed requests for which you are on the notification list. If you access a Report Encyclopedia over the World Wide Web the completed Requests folder appears as your personal channel in a web browser.

Related terms
channel
notification

request
Report Encyclopedia
World Wide Web (WWW or W3)

role A name for a group of privilege levels. Privileges are granted by an administrator who assigns roles.
Related terms
administrator
privilege

role owner A user who has full administration privileges for a role.
Related terms
administrator
role

row A record in a table.
Related term
table

run To request current data in a new instance of an e.report. A report executable (.ROX) is run to generate a new report.
Related terms
data
e.report
report object executable (.ROX) file
report object instance (.ROI) file

scheduled request

A request designated for execution at a specified time. Scheduled requests are items in the Requests folder.
Related terms
request
Requests folder
server application

SDK (Software Development Kit)

See Actuate Software Development Kit (SDK).

search A mechanism that uses search criteria to find data in an e.report.
Related terms
data
e.report
search criteria

search criteria

A combination of objects to be used for searching and search expressions.

Related terms
object
search
search expression

search definition (.ROS) file

A file that contains search criteria, data to display, extract options, and report document structure information.

Related terms
Basic source (.BAS) file
data
e.report
report object design (.ROD) file
report object executable (.ROX) file
report object instance (.ROI) file
report object library (.ROL) file
report object value (.ROV) file
report object web (.ROW) file
search criteria

search expression

The use of special characters to match patterns in the value fields in the search dialog box. The special characters used in search expressions are the backslash (\), the question mark (?), the pound sign (#), the asterisk (*), and the brackets ([ ]). Some nonprinting ASCII codes are represented by character pairs that begin with the backslash (\a, \b, \t, \n, \f, and \r). The special characters and examples of their use include the following.

Special characters	Definition
\	Escape next character (one- or two-byte character)
?	Match any one character (one- or two-byte character)
#	Match any ASCII numeric character [0-9]
*	Match zero or any number of character(s)
\a	Match one alarm (0x07)
\b	Match one backspace (0x08)
\t	Match one tab (0x09)
\n	Match one new line (0x0a)
\f	Match one form feed (0x0c)
\r	Match one carriage return (0x0d)
\\	Match one backslash (\)
[ ]	Match zero characters (ignored)

Special characters	Definition
[characterlist]	Match any one character inside the brackets
[a-z0-9]	Match any lowercase or ASCII numeric character
[a-z-]	Match any lowercase character or hyphen (-)
[^a-z0-9]	Match any character other than lowercase or ASCII numeric
[^]	Match one caret (^)
[?] or \?	Match one question mark (?)
[#] or \#	Match one pound sign (#)
[*] or *	Match one asterisk (*)
[[] or \[	Match one open bracket ([)
[]] or \]	Match one closed bracket (])
[\[-\]]	Match any ASCII character code between "[" and "]"
[\1-\377]	Match any one-byte character excluding NUL (0x00)
[\x100-xffff]	Match any two-byte character

Related term
wildcard

search extension

A dynamic-link library that provides an interface between Actuate client applications and third party applications such as Microsoft Excel and BrioQuery.
Related term
dynamic-link library (DLL)

search extension API

See Actuate Software Development Kit (SDK).

search indexing

A technique used to identify frequently searched fields to support faster searching of selected data appropriate to a user's privileges.
Related terms
data
privilege
search

section

A component that determines the logical structure of information in an e.report.

Related terms
component
e.report

secure read privilege

A privilege that provides the option to open, work with, print, but not download an item in the Report Encyclopedia on the e.Reporting Server. The Advanced e.Reporting Server secure read privilege enables page security on a report object instance file. Other privileges include delete, execute, grant, read, visible, and write.
Related terms
Actuate Advanced e.Reporting Server
Actuate e.Reporting Server
delete privilege
execute privilege
grant privilege
privilege
Report Encyclopedia
report object instance (.ROI) file
read privilege
visible privilege
write privilege

security ID

An identifier such as a user name, an assigned name, or a role that is specified in a particular e.report by the report designer.
Related terms
access control list (ACL)
e.report
role
user name

server application

An application that furnishes data in response to a request from a client application. A server is often located on a computer other than the client.
Related terms
Actuate e.Reporting Server
client/server

server processes

A set of cooperating processes that constitute an Actuate e.Reporting Server. The server processes are Administration, Factory, Persistent Object, Print, Request, and View.
Related terms
Actuate e.Reporting Server
Administration process
Factory process

Persistent Object process
Print process
Request process
View process

SGML (standard generalized markup language)

See standard generalized markup language (SGML).

SmartSearch

See search.

SQL SELECT statement

One statement in SQL (Structured Query Language), a language commonly used for database applications. A SQL SELECT statement provides instructions about which data to query for an e.report.

Related terms
e.report
query

standard generalized markup language (SGML)

A generic markup language that represents documents. SGML is an international standard that describes the relationship between document content and structure.

Related term
structured content

Contrast with
extensible markup language (XML)

structured content

A formatted document that displays information from multiple data sources.

Related term
e.report

subreport

A report section placed inside another section. A report section placed inside another report section is sometimes called a nested report.

Related terms
component
e.report
section

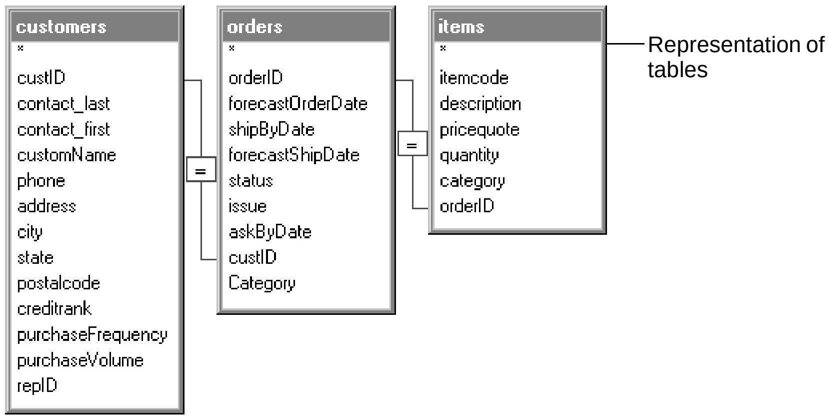
subscribe

A process that allows users to receive notification that a particular report or class of reports is available for viewing. To receive notifications of reports that are viewable in a web browser, a user subscribes to a channel.

Related terms
Actuate ReportCast technology
channel

e.report
publish and subscribe
web browser
Contrast with
unsubscribe

table A named group of related data in rows and columns in a relational database.



Related terms
column
data
row

table of contents

A hyperlinked outline of report contents.
Related terms
e.report
hyperlink

Tag A code that identifies a part of a document so that a web browser can tell how to display it.
Related term
web browser

template A file that determines how generated HTML pages display in a web browser. Template files can contain HTML tags and scripting language commands which determine the format of the text, the text that should be displayed, and variables that form part of your request.
Related terms
hypertext markup language (HTML)
page
web browser

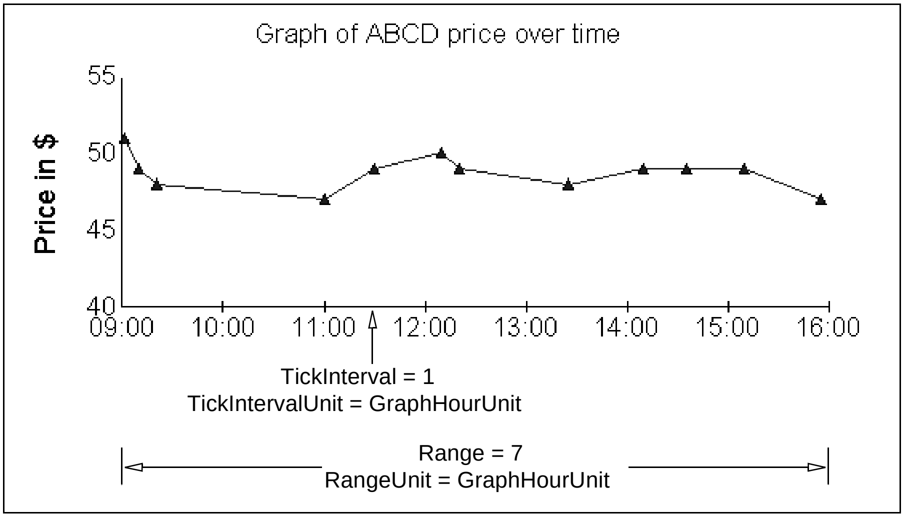
tick A mark that occurs at regular intervals along the x- or y-axis of a graph.

Related terms

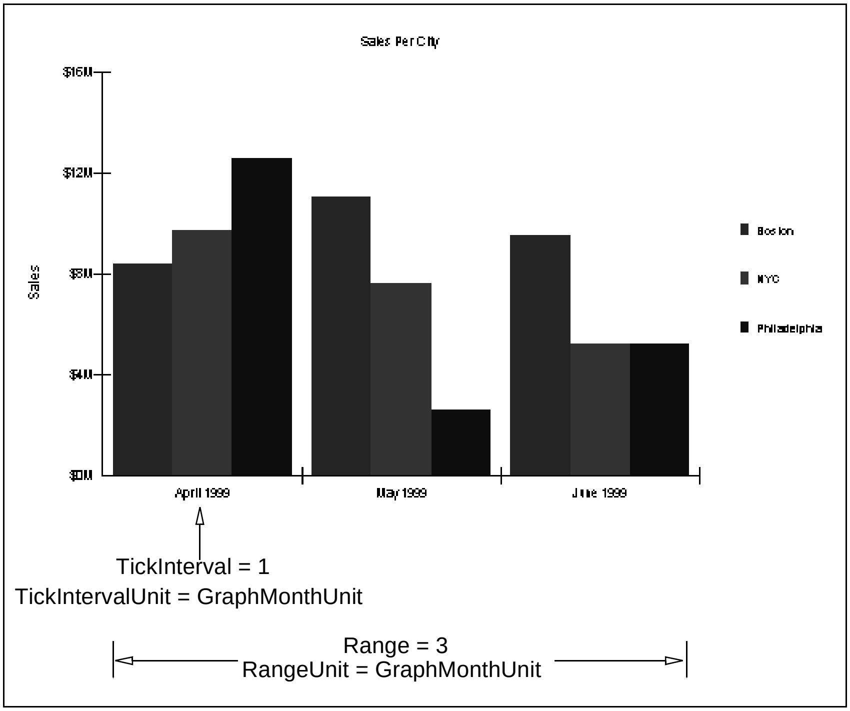
graph

tick interval

tick interval **1** For a detail graph, the distance between tick marks on the x-axis.

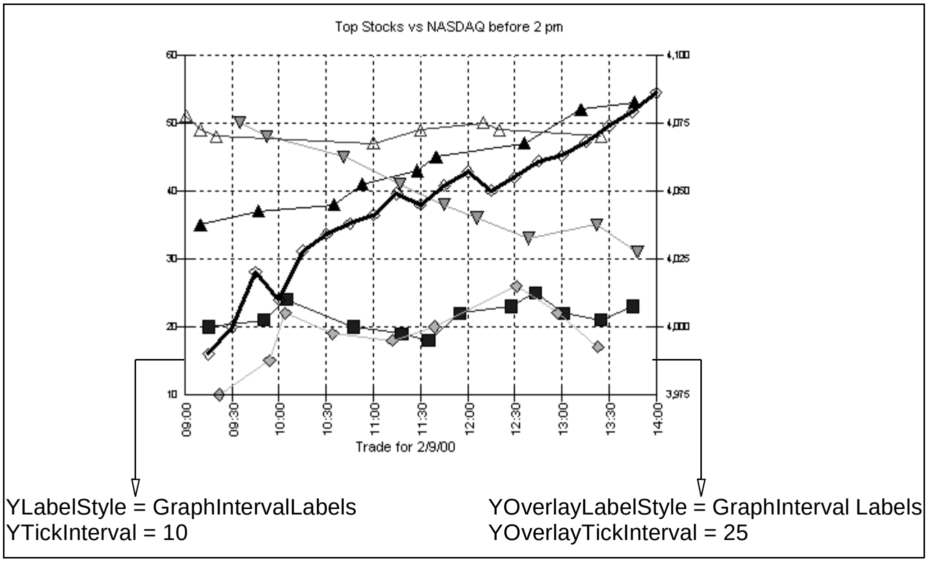


For a summary graph, the type of category that is created.



The tick interval for the x-axis is specified by the TickInterval and TickIntervalUnit properties.

2 The distance between tick marks on the y-axis or overlay axis. The tick interval for the y-axis is specified by setting YLabelStyle to GraphIntervalLabels and YTickInterval to the appropriate value. The tick interval for the overlay axis is specified by setting YOverlayLabelStyle to GraphIntervalLabels and YOverlayTickInterval to the appropriate value.



Related terms
graph
overlay graph
range
time series graph

time series graph

A type of graph in which the calculation of the x-axis labels is based upon the Range, RangeUnit, RoundTo, TickInterval, and TickIntervalUnit properties.

Related terms
graph
range
tick interval

toolbar

A bar containing various buttons that provides access to common tasks. Different toolbars are available during different kinds of tasks.

Main Toolbar

Transporter technology

See search extension

Uniform Resource Locator (URL)

A character string that identifies the location and type of a piece of information accessible over the World Wide Web. http:// is the familiar indicator that a document is accessible over the World Wide Web. The characters following http:// indicate the domain name of the computer where the information is stored and the precise place within the directory structure where the document is located.

Related terms

domain name
HyperText Transfer Protocol (HTTP)
World Wide Web (WWW or W3)

universal hyperlink

See hyperlink.

unsubscribe

A process by which a user removes himself from a list of recipients of specified e.reports or classes of e.reports. Actuate ReportCast technology enables subscribe and unsubscribe capabilities.

Related terms

Actuate ReportCast technology
channel
e.report
publish and subscribe

Contrast with

subscribe

URL

See Uniform Resource Locator (URL).

url request

A Web address that contains directives for Actuate ReportCast.

Related terms

Actuate ReportCast
ReportCast directive
Uniform Resource Locator (URL)

user agent

Client software that interprets information provided in a particular format, then presents the information in a format easily accessible by the user. User agents include web, text-only, and graphical browsers, audio and Braille browsers, search robots, and proxies.

user name

A name that identifies a user of the Report Encyclopedia. The administrator uses the Administrator Desktop to create user names. A user name can be up to 256 characters in length and contain any ASCII characters except control characters. User names can include spaces. User names are not case-sensitive, but names are displayed as typed by the administrator.

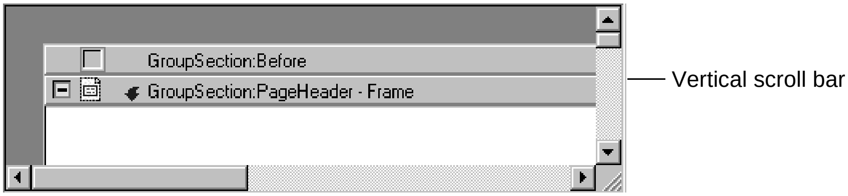
Related terms

administrator

password
Report Encyclopedia

vertical scroll bar

A scroll bar at the right side of the window used to move the screen view up and down to access information formats longer than the initial document screen settings permit.



Contrast with
horizontal scroll bar

view

To look at, search, use the table of contents, and follow hyperlinks in an online report or e.report.
Related terms
Actuate Viewer
e.report
report object instance (.ROI) file
View process

Viewer

See Actuate Viewer.

View process

An Actuate e.Reporting Server process that converts Actuate report documents to DHTML, PDF, or XML format. The server processes are Administration, Factory, Persistent Object, Print, Request, and View.
Related terms
Actuate e.Reporting Server
dynamic hypertext markup language (DHTML)
server processes
extensible markup language (XML)

Virtual Report Distribution

A mechanism for supplying reporting information over a network with reduced storage and network bandwidth requirements. Virtual Report Distribution stores a single copy of an e.report in a central location, and sends only the pages users want to view. The mechanism is also called demand paging. The mechanism is virtual because users are not required to have a local copy of the report, yet they have efficient access to the report.

Related term
e.report
demand paging

visible privilege

A privilege that provides the option to view items in the Report Encyclopedia. Other privileges include delete, execute, grant, read, secure read, and write.

Related terms
delete privilege
execute privilege
grant privilege
privilege
read privilege
secure read privilege
Report Encyclopedia
write privilege

volume

1. A collection of Encyclopedia items managed by an Actuate e.Reporting Server. Administrators use a volume to group parts of a large Encyclopedia in convenient and manageable clusters.
2. The name of the machine on which the Actuate e.Reporting Server is running.

Related terms
administrator
Actuate e.Reporting Server
Report Encyclopedia

Web

See World Wide Web (WWW or W3).

Web Agent

See Actuate ReportCast.

web browser

An application that runs on a computer connected to the Internet and provides access to information distributed on the World Wide Web. An HTML report displays in a web browser.

Related terms
browser
hypertext markup language (HTML)
Internet
World Wide Web (WWW or W3)

webcast

See Actuate ReportCast technology.

web page

See HyperText Markup Language Page.

web server A program that accepts requests for information based on the HyperText Transfer Protocol (HTTP). The server processes the request and sends the document to the web browser for display.

Related terms

HyperText Transfer Protocol (HTTP)

web browser

wildcard A character used in a search or conditional expression that matches one or more literal characters. Actuate wildcards include the following.

Wildcard	Definition
?	Match any one character (one- or two-byte character)
#	Match any ASCII numeric character [0-9]
*	Match zero or any number of character(s)

Related term

search expression

World Wide Web Consortium (W3C)

An international, but unofficial standards body that provides recommendations regarding Web standards. The World Wide Consortium publishes several levels of documents including notes, working drafts, proposed recommendations, and recommendations about Web applications related to topics such as HTML and XML.

Related terms

extensible markup language (XML)

hypertext markup language (HTML)

Internet

World Wide Web (WWW or W3)

World Wide Web (WWW or W3)

An information system accessed through the Internet. The information available is heavily cross-referenced and linked so you access information primarily by clicking hyperlinks that take you to other documents. The Web uses the HyperText Transfer Protocol (HTTP) that specifies how an application locates and acquires documents stored on other computers also attached to the Internet.

Related terms

hyperlink

Internet

HyperText Transfer Protocol (HTTP)

link

write privilege

A privilege that provides the option to place an item in the Report Encyclopedia. Other privileges include delete, execute, grant, read, secure read, and visible.

Related terms

delete privilege
execute privilege
grant privilege
privilege
read privilege
Report Encyclopedia
secure read privilege
visible privilege

WWW

See World Wide Web (WWW or W3).

XML converter

A tool that changes data in one XML format to another XML format.

Related terms

data
extensible markup language (XML)

XML (extensible markup language)

See extensible markup language (XML)

XML data format

A data format produced by Actuate Developer Workbench.

Related terms

Actuate Developer Workbench
data
extensible markup language (XML)

XML data stream

Output generated by an XML converter.

Related term

extensible markup language (XML)

XML display format

An Actuate report format that encapsulates XML data and XML display formats.

Related term

data
XML display format

XML report

An e.report dynamically generated from an Actuate report object instance (.ROI).

Related terms

e.report
extensible markup language (XML)
report object instance (.ROI) file
structured content

Index

Symbols

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